

MYOB Advanced

Upgrade Notes

2020.6

myob

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Introduction

Welcome to the 2020.6 release of MYOB Advanced. The purpose of this document is to provide essential information on the changes included in this release that affect the process of upgrading from an earlier version of MYOB Advanced.

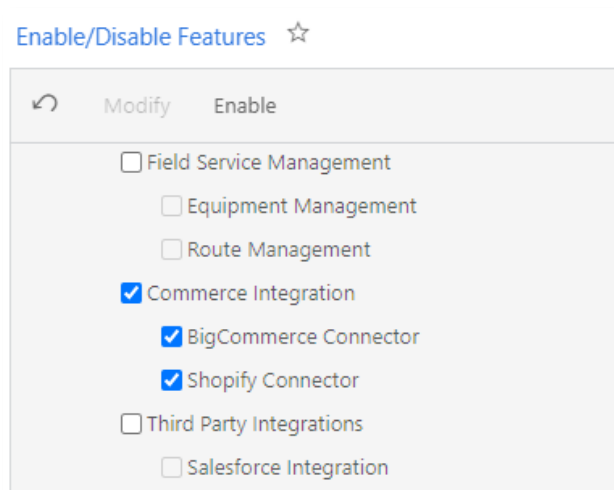
Upgrade Notes

Third-party Integrations

As of this release, the commerce-related functionality, which supports out-of-the-box integration with the BigCommerce and Shopify automated shopping cart solutions, is no longer provided as a customisation project. Instead, this functionality has now become part of the core product of MYOB Advanced and is subject to the product's licensing policies.

Enabling the E-Commerce Functionality

The commerce-related functionality is available when the "Commerce Integration" feature and either of the features supporting the integration with a particular e-commerce platform (which are shown in the following screenshot) is enabled or both of the features are enabled on the Enable/Disable Features screen (CS100000).



When the Commerce Integration feature is enabled, the following screens become available:

- Entities (BC202000)
- Prepare Data (BC501000)
- Process Data (BC501500)
- Sync History (BC301000)

For both supported platforms, BigCommerce and Shopify, these screens are used for configuring entities for synchronisation, synchronizing data, scheduling synchronisation, and viewing the synchronisation status of particular entities.

When the BigCommerce Connector feature is enabled, functionality specific to the BigCommerce shopping cart software is activated, and an additional screen, BigCommerce Stores (BC102000), becomes available. This screen is used for establishing a connection between the MYOB Advanced instance and a BigCommerce store, as well as for configuring default store settings for data exchange.

When the Shopify Connector feature is enabled, the system activates the functionality supporting integration with the Shopify platform.

Upgrade Notes

Before upgrading to MYOB Advanced 2020.6, the implementation consultant should note the following:

- Real-time synchronisation, if it was started, must be stopped.
- The BigCommerce customisation project must be unpublished before the upgrade.
- After the upgrade to 2020.6 has been completed and the Commerce Integration feature has been enabled on the Enable/Disable Features screen (CS100000), all of the following will be preserved:
 - The store settings specified on the BigCommerce Stores screen (BC201000)
 - Any custom filters and field mappings defined for particular entities on the Entities screen (BC202000)
 - All data related to the synchronisations performed before the upgrade
- During the upgrade, the existing Commerce Edition customisation project data—including the Commerce workspace and the generic inquiries and filters used in the commerce-related dashboard—will be recreated. If any of these generic inquiries and filters have been modified in a previous version, they should be exported before the upgrade to MYOB Advanced 2020.6.
- Any automation schedules that have been defined for the processes of fetching data and synchronizing data on the Fetch Data (BC501000) and Sync Data (BC501500) screens might not be preserved. We recommend that you check these schedules after the upgrade and recreate them, if necessary. Automation schedules that have been defined on the Real-Time Sync screen (BC502000) will not be preserved; automation schedules are no longer used to restart real-time synchronisation.
- The Fetch Data screen has been renamed to Prepare Data, the Sync Data screen has been renamed to Process Data, and the Real-Time Sync screen has been removed.

Construction

As of this release, the construction functionality is no longer provided as a customisation project. Instead, this functionality has now become part of the core product of MYOB Advanced.

Before performing the upgrade to MYOB Advanced 2020.6, the appropriate users and administrative users should read the information described in the sections of this topic.

General Upgrade Notes

Because the construction functionality has been moved to the core product, the following customisation packages have been eliminated and must be unpublished before the upgrade to 2020.6:

- ConstructionFeatures
- ConstructionReporting
- ConstructionDashboards

Detailed information on the screens, reports, and objects of each package that have been moved to the core product is provided in the sections below.

Preparing the System for the Upgrade

Before an administrative user starts to upgrade the system to MYOB Advanced Construction Edition 2020.6, the following preparations should be made in the system:

1. The administrative user must unpublish all customisations that have been applied to the current version.
2. If there are generic inquiries, reports, or other objects in the system (such as those in the list below) that have been created for the construction functionality in previous versions of MYOB Advanced, and they must be kept after upgrade, the user must export these objects as XML files.

The following system objects are affected by the upgrade procedure:

- Reports (.rpx files)
 - Generic inquiries
 - Shared filters
 - Pivot tables
 - Import and export scenarios
 - Automation definitions
 - Customisation package files
 - Customisation package contents
 - Wikis
 - Site map
 - Dashboards
 - Any other construction-related entities that can be exported as XML files
3. Copy and save the descriptions of the N/A status that is configured on the Status tab of the Drawing Log Preferences (PJ102000) and Photo Log Preferences (PJ103000) screens, if these descriptions differ from the default description (which is DEFAULT).
 4. Save a copy of the modified AP Register report (AP621500), which was previously included in the ConstructionReporting package.

Upgrade Procedure

The system performs the following actions during the upgrade procedure:

1. References to the system objects listed above are updated. If any of the object references are not updated, the user will need to update them manually after the upgrade procedure completes.
2. The IDs (and some of the titles) of the screens, reports, and generic inquiries are updated. For the list of affected screens, reports, and inquiries, see the tables in the sections below, which list the respective screens grouped by the customisation packages in which they have been included previously and by the functional areas to which these screens, reports, and inquiries relate.
3. The ZPMREVCOAMT and ZPMPTDDData database views are replaced by the PX.Objects.CN.PMPTDDData and PX.Objects.CN.PMRevisedCOAmount database views, respectively.
4. The Usr prefix is deleted from the column names. For the full list of affected columns, see the tables below.
5. Multiple columns are removed from the Contract database table and added to the PMAddress database table. For the full list of affected columns, see the tables below.
6. The CRActivityExt and NoteDocExt database tables are removed. The CRActivityExt.IsFinalAnswer and CRActivityExt.RecipientNotes columns are replaced with the CRActivity.IsFinalAnswer and CRActivity.RecipientNotes columns, respectively.
7. Multiple new objects are added to the system. See the sections below for details.

Important Notes After the System Upgrade

All parties to be involved in the system upgrade should read the following notes to become acquainted with the actions they may need to perform after the upgrade:

1. All links referring to renamed objects must be modified manually. There is no automation procedure for changing the names of the renamed objects in system references.
2. If the ConstructionFeatures package has been published in the system prior to upgrade to MYOB Advanced 2020.6, the project management screens gets the new NoteID value. As a result, when the system is being upgraded, the site map entries for the updated project management screens will be duplicated. We recommend that any duplicates be removed manually after the upgrade.
3. During the MYOB Advanced upgrade procedure, the organisation's versions of the shared filters are not replaced with the current product's version of these filters. This means that after the upgrade from an earlier product version to MYOB Advanced 2020.6, the shared filters listed in the tables below will remain as they are in the customer's database. To update the shared filters after upgrade to the ones introduced in MYOB Advanced 2020.6, contact the Support team.
4. Update the descriptions of the N/A status that are specified on the Status tab of the Drawing Log Preferences (PJ102000) and Photo Log Preferences (PJ103000) screens, which have been saved before the upgrade.
5. The system objects that refer to PX.Objects.CN.ProjectManagement and ProjectManagement cannot be imported to MYOB Advanced 2020.6. If some of the object names have not been updated during the upgrade, edit the respective XML file and change the ProjectManagement to PX.Objects.PJ. The following table lists the object names that have to be updated after the upgrade.

Construction Package Object Name (2020.4)	Core Product Object Name (2020.6)
PX.Objects.CN.ProjectManagement	PX.Objects.PJ
ProjectManagement	PX.Objects.PJ

If the generic inquiries refers to the PX.Objects.CN.ProjectManagement object, then the object must be exported, and in the XML file, the user needs to change the object title from ProjectManagement to PX.Objects.PJ. For example, for the Daily Field Report (PJ3040PL) generic inquiry, the ProjectManagement.DailyFieldReports.PJ.DAC.DailyFieldReport object must be renamed to PX.Objects.PJ.DailyFieldReports.PJ.DAC.DailyFieldReport.

- If a system object uses the PX.Objects.PM.ZPMREVCOAMT database view or the PX.Objects.PM.ZPMPTDDData database view, both of which have been removed during the upgrade, change the references as follows.

Construction Package Object Name (2020.4)	Core Product Object Name (2020.6)
PX.Objects.PM.ZPMREVCOAMT	PX.Objects.CN.PMRevisedCOAmount.
PX.Objects.PM.ZPMPTDDData	PX.Objects.CN.PMPTDDData

- If the generic inquiries refer to any of the renamed columns (those from which the Usr prefix has been deleted), the user needs to manually update the generic inquiries with the new column names.

For the list of known issues that could occur after the upgrade, see Installation and Upgrade Notes. Migration of the ConstructionFeatures Package: The Project Management Functionality

The following table lists the screens that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen (CS100000).

Form Title and ID in the Package	Form Title and ID in the Core Product	Files Added on Upgrade
Request for Information (PJ301000)	Request for Information (PJ301000)	PJ301000.rpx
Assign Request for Information (PJ501000)	Assign Request for Information (PJ501000)	PJ501000.rpx
Project Issue (PJ302000)	Project Issue (PJ302000)	PJ302000.rpx
Assign Project Issue (PJ502000)	Assign Project Issue (PJ502000)	PJ502000.rpx
Drawing Logs (PJ403000)	Drawing Logs (PJ403000)	PJ403000.rpx
Drawing Log Preferences (PJ102000)	Drawing Log Preferences (PJ102000)	PJ102000.rpx
Photo Logs (PJ405000)	Photo Logs (PJ405000)	PJ405000.rpx

Form Title and ID in the Package	Form Title and ID in the Core Product	Files Added on Upgrade
Photo Log Preferences (PJ103000)	Photo Log Preferences (PJ103000)	PJ103000.rpx
Daily Field Report (PJ304000)	Daily Field Report (PJ304000)	PJ304000.rpx
Load Daily Field Report Weather Conditions (PJ504000)	Load Daily Field Report Weather Conditions (PJ504000)	PJ504000.rpx
Clear Daily Field Report Weather Processing Log (PJ504010)	Clear Daily Field Report Weather Processing Log (PJ504010)	PJ504010.rpx
Daily Field Report Weather Processing Log (PJ404000)	Daily Field Report Weather Processing Log (PJ404000)	PJ404000.rpx
Project Management Classes (PJ201000)	Project Management Classes (PJ201000)	PJ201000.rpx
Project Management Preferences (PJ101000)	Project Management Preferences (PJ101000)	PJ101000.rpx

The following table lists the reports that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen.

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Project Issue Form (PJ662000)		Project Issue Form (PJ662000)	Project Issue Form (PJ662000)
Drawing Logs Detail (PJ653000)		Drawing Log Details (PJ653000)	Drawing Logs Detail (PJ653000)
Daily Field Report Form (PJ644000)		Daily Field Report Form (PJ644000)	Daily Field Report Form (PJ644000)
Daily Field Report By Project Form (PJ644050)		Daily Field Report by Project Form (PJ644050)	
RFIs Outstanding (RI000023)	<ul style="list-style-type: none"> • rfioutstandingmailcc.rpx • rfioutstandingownerinfo.rpx • rfioutstandingsubreport.rpx • fioutstandingrequestdate.rpx 	RFIs Outstanding (PJ664000)	Report form: PJ664000.rpx Related subreports: PJ664001.rpx PJ664002.rpx PJ664003.rpx PJ664004.rpx

The following generic inquiries are now included in the core product if the Construction feature is enabled on the Enable/Disable Features form.

- Project Management Classes (PJ2010PL)
- Daily Field Report (PJ3040PL)
- Request For Information (PJ3010PL)
- Submittals (PJ3060PL)

The following shared filters are now included in the core product if the Construction feature is enabled on the Enable/Disable Features form.

Shared Filter Name	Form Title and ID
My Daily Field Reports	Daily Field Report (PJ3040PL)
My Project Issues	Project Issues (PJ302010)
MY RFIs	Request for Information (PJ3010PL)
My Submittals	Submittals (PJ3060PL)
Project Contacts	The Contact selector on the Submittal Workflow tab of the Submittals screen (PJ306000)
Project List	The Contact selector on the Relations tab of the Request for Information screen (PJ301000)

Migrating the ConstructionFeatures Package

The Work-in-Progress and Bonding Reports

Old versions of the work-in-progress and bonding report files provided with the ConstructionFeatures customisation package have been removed from the product and will no longer be available. In a system with the published customisation, these reports were stored in the UserReport database table. During the organisation's upgrade to MYOB Advanced 2020.6, these reports will be deleted, along with any customisations that have been made to the reports, and replaced with the new versions of the reports.

Before the upgrade, if the organisation needs to continue using the customised reports with the noted UserReport.ReportName values, an administrative user has to save copies of these reports. However, we strongly recommend that the developers instead customise the new reports.

The following table lists the work-in-progress and bonding reports that are now included in the core product if the "Construction" feature is enabled on the Enable/Disable Features screen (CS100000).

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Construction Bonding Report (CU000115)	bondingreport.rpx	Construction Bonding Report (PM650500)	PM650500.rpx Related subreport: PM651050.rpx
Project WIP (CU000004)	pmwip.rpx	Project WIP (PM651000)	PM651000.rpx Related subreports: PM651050.rpx

Project WIP with Date Range (CU000032)	pmwipwithdaterange.rpx	Project WIP With Date Range (PM651500)	PM651500.rpx Related subreports: PM651050.rpx PM651550.rpx
Project WIP Detail (CU000005)	pmwipdetail.rpx	Project WIP Detail (PM652000)	PM652000.rpx Related subreports: PM652050.rpx
Project WIP Detail with Date Range (CU000033)	Report form: pmwipdetailwithdaterange.rpx Related subreports: pmwipsubdaterange.rpx pmwipdetailsubdaterange.rpx pmwipCODate.rpx pmwipdetailCODate.rpx	Project WIP Detail With Date Range (PM652500)	Report form: PM652500.rpx Related subreports: PM652050.rpx PM652550.rpx

The Substantiated Billing Reports

If the organisation needs to continue using the customised reports with the noted UserReport.ReportName values, before the upgrade, an administrative user has to save copies of these reports. However, we strongly recommend that the developers instead customise the new reports. During the upgrade, the records with UserReport.ReportName = 'CU000071' and UserReport.ReportName = 'CU000119' will be deleted from the database and no longer supported.

The following table lists the substantiated billing reports that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen (CS100000).

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Substantiated Billing (CU000071)	CU000071.rpx	Substantiated Billing (PM650000)	PM650000.rpx
Substantiated Billing - Consolidated (CU000119)	CU000119.rpx	Substantiated Billing - Consolidated (PM650050)	PM650050.rpx

For a detailed description of the changes in substantiated billing reports, see Construction: Improvements to the Substantiated Billing Reports.

Cost Projection Functionality

The following table lists the cost projection screens and reports that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen (CS100000).

Form Title and ID in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Cost Projection Classes (PM203500)	Cost Projection Classes (PM203500)	PM203500.rpx
Cost Projection (PM305000)	Cost Projection (PM305000)	PM305000.rpx

The following table lists other UI elements related to cost projection functionality that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen.

Form	Applicable screens and UI Elements
Projects Preferences (PM101000)	Cost Projection Approval Map and Cost Projection Approval Notification fields have been added.
Projects (PM301000)	<ul style="list-style-type: none"> An Inquiries > Cost Projection menu command has been added. On the Cost Budget tab, Projected Quantity to Complete, Projected Quantity at Completion, Projected Cost to Complete, Projected Cost at Completion, and Completed (%) columns have been added.

Mobile screens

The following mobile screens are now included in the core product if the Construction and Construction Project Management features are enabled on the Enable/Disable Features screen (CS100000):

- Photo Logs (PJ405000)
- Photo (PJ305000)
- Photo Log (PJ305000)
- Photo (PJ305010)
- Change Orders (PM308000)
- Change Orders (PM3080PL)
- Project Issue (PJ302000)
- Request For Information (PJ301000)
- Request For Information (PJ3010PL)
- Daily Field Report (PJ304000)
- Daily Field Report (PJ3040PL)

Other Enhancements

The following table lists other functionality enhancements and related UI elements that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen (CS100000).

Added Functionality	Applicable screens and UI Elements	Important Notes
Workspace icon and title is changed when feature is enabled	If the Construction feature is enabled on the Enable/Disable Features form, the Projects workspace title is changed to Construction and the schedule icon changes to the crane icon.	<p>The Construction workspace title and icon may be forcibly reset to the Project ones in the following cases:</p> <ul style="list-style-type: none"> • If the user clicks the Reset to Default Menu Settings button. • If the user imports any XML file that refers to the Projects workspace. The system will reset the workspace, because the workspace information from the imported file overwrites the current workspace information. This situation occurs on import of XML with any entity related to the menu (such as site map, wiki, generic inquiries, dashboards, pivot tables, analytical reports, and import and export scenarios), or on publication of a customisation package that contains <ul style="list-style-type: none"> • modifications to the Construction workspace. <p>The user can restore the Construction workspace title and icon by disabling and enabling the Construction feature on the Enable/Disable Features form.</p>
Added Functionality	Applicable screens and UI Elements	Important Notes
User-defined fields	<p>The User-Defined Fields tab has been added on the following screens:</p> <ul style="list-style-type: none"> • Request for Information (PJ301000) • Project Issue (PJ302000) • Daily Field Report (PJ304000) • Submittals (PJ306000) • Drawing Log (PJ303000) • Photo Log (PJ305000) 	
Outlook add-in functionality enhancements	<ul style="list-style-type: none"> • Projects • Request for Information form • Project Issue form 	<p>If the Construction Project Management and Outlook Integration features are enabled on the Enable/Disable Features form, a user now can create requests for information and project issues directly from Outlook. Also, the user can create email activities linked to projects, requests for information, or project issues.</p>

Added Functionality	Applicable screens and UI Elements	Important Notes
Multiple customers in opportunities	<p>The ability to specify multiple customers in opportunities on the Opportunities screen (CR304000) has been added. The following UI elements have been added on the form:</p> <ul style="list-style-type: none"> Multiple Customers check box in the Summary area Multiple Customers tab 	<p>In the screen-based API for the Opportunities form, the following changes have been made:</p> <ul style="list-style-type: none"> QuotedAmount has been renamed to AmountQuotedAmount. CuryProductsAmount has been renamed to TotalCuryProductsAmount. CuryAmount has been renamed to AmountCuryAmount. TotalAmount has been renamed to TotalTotalAmount
Import scenario	On the Import Scenarios screen (SM206025), the Import Project WIP predefined scenario has been added.	
Export scenario	On the Export Scenarios screen (SM207025), the Export Project WIP predefined scenario has been added.	

Reports and Inquiries Moved to the Core Product

The following table lists the reports that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen (CS100000).

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
AP Docs by Project With Paid Amt (AP734100)	apopendocumentsbyproject.rpx	AP Docs by Project With Paid Amt (AP734100)	AP734100.rpx
AR Docs by Project With Paid Amt (AR734100)	aropendocumentsbyproject.rpx	AR Docs by Project With Paid Amt (AR734100)	AR734100.rpx
Subcontract (SF) (CU000006)	subcontractorshortform.rpx	Subcontract (SF) (SC642000)	SC642000.rpx
Subcontractor Agreement (LF) (CU000011)	subcontractorlongform.rpx	Subcontract Agreement (LF) (SC643000)	SC643000.rpx
Compliance By Project (CU000012)	compliancebyproject.rpx	Compliance by Project	CL643000.rpx
Compliance By Supplier (CU000014)	compliancebysupplier.rpx	Compliance by Supplier (CL644000)	CL644000.rpx

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Project Profit Analysis (CU000015)	pmprofitanalysis.rpx	Project Profit Analysis (PM656000)	PM656000.rpx
Project Performance (CU000016)	pmperformance.rpx	Project Performance (PM654000)	PM654000.rpx
Project Cost Budget Status (CU000017)	pmcostbudgetstatus.rpx	Project Cost Budget Status (PM655000)	PM655000.rpx
Pro Forma Invoice With Qty (CU000024)	customproformainvoice.rpx	Pro Forma Invoice with Qty (PM653000)	PM653000.rpx
Change Order Commitments (CU000028)	Report form: subcontractchangeorder.rpx Related subreports: commitmentpreviousco.rpx committedorigamount.rpx	Change Order Commitments (SC645000)	Report form: SC645000.rpx Related subreports: SC645001.rpx SC645002.rpx
Subcontract Audit Detail (CU000041)	Report form: subcontractauditdetail.rpx Related subreports: subcontractauditchangeordersdetail.rpx subcontractauditinvoicesdetail.rpx subcontractauditcompliancecdetail.rpx	Subcontract Audit Detail (SC646000)	Report form: SC646000.rpx Related subreports: SC646001.rpx SC646002.rpx SC646003.rpx
Subcontract Payment (CU000042)	subcontractpayment.rpx	Subcontract Payment (SC647000)	SC647000.rpx
AR Aged period Sensitive With Retainage (CU000077)	aragedperiodsensitivewithretainage.rpx	AR Aged Period Sensitive With Retainage (AR744000)	AR744000.rpx
Subcontract Audit (CU000018)	Report form: subcontractaudit.rpx Related subreports: subcontractauditinvoices.rpx subcontractauditchangeorders.rpx	Subcontract Audit (SC644000)	Report form: SC644000.rpx Related subreports: SC644001.rpx SC644002.rpx

Form Title and ID in the Package	Related Files in the Package	Form Title and ID in the Core Product	Related Files in the Core Product
Service Order Profitability (CU000088)	Report form: customserviceorderprofitability.rpx Related subreports: customserviceorderprofitabilityexpenses.rpx customserviceorderprofitabilitystockexpenses.rpx customserviceordersprofitabilitystaff.rpx	Service Order Profitability (FS631000)	Report form: FS631000.rpx Related subreports: FS631500.rpx FS632000.rpx FS632500.rpx

The following table lists the generic inquiries that are now included in the core product if the Construction feature is enabled on the Enable/Disable Features screen.

Form Title and ID in the Package	Form Title and ID in the Core Product
Supplier Commitment Details (CU000001)	Supplier Commitment Details (PMGI0015)
Comm. By Supplier Summary (CU000002)	Commitments Summary by Supplier (PMGI0045)
Project Summary (CU000003)	Project Summary (PMGI0025)
Revised Contract vs Approved CO (CU000025)	Revised Contract vs Approved CO (PMGI0040)
Custom Project Transactions Inquiry (CU000084)	Project Transaction Inquiry (PMGI0035)

The following reports are now included in the SalesDemo Dashboards package:

- pmactivity.rpx
- pmsummary.rpx
- pminvoices.rpx
- pmbudgetgraph.rpx
- pmpos.rpx

The Project P&L by Month object (PMPLMON) has been moved from the Analytical Reports section of the ConstructionReporting package to the SalesDemo Dashboards package.

Construction-Related Information Added to Standard Reports

Enhanced versions of financial, inventory and order management, and project reports that include construction-specific information have been introduced in this release.

The construction-related information appears in the listed reports if the Construction feature is enabled on the Enable/Disable Features screen (CS100000). In addition, for the accounts payable reports to present construction-related information, the Require Single Project per Document check box must be selected on the Accounts Payable Preferences screen (AP101000).

According to the MYOB Advanced upgrade procedure, the organisation's versions of the existing reports and generic inquiries are not replaced with the current product version of the reports. This means that after an upgrade from an earlier product version to MYOB Advanced 2020.6, the financial, inventory and order management, project reports, and generic inquiries listed in the tables below will remain as they are in the customer's database. To update the reports and generic inquiries to the ones introduced in this release, the user has to remove custom report versions from the system before the upgrade.

The following table lists the standard financial, inventory and order management reports that have been modified in the core product to include the construction-specific information if the Construction feature is enabled on the Enable/Disable Features screen.

Report Enhancements	Applicable Reports
The Project parameter has been added to the report.	<ul style="list-style-type: none"> • Bills Pending Approval (AP611000) • Bills Pending Payment (AP611500) • AR Register (AR621500) • AR Register Detailed (AR622000) • AR Coming Due (AR631500) • AR Balance by Customer (AR632500) • Inventory Account Distribution (IN611500)
The Project parameter and the Project column have been added to the report.	<ul style="list-style-type: none"> • Checks Pending Printing (AP612500) • Payments Pending Processing (AP651000) • Transactions for Period (GL633000) • Purchase Order Details by Supplier (PO611000) • Purchase Receipt Details by Supplier (PO621000)
The Project parameter has been added to the report. The report lines are now grouped by project.	<ul style="list-style-type: none"> • GL Edit Detailed (GL610500) • GL Register Detailed (GL621000) • Transactions for Account (GL633500)
The Project Manager parameter and the Project Manager column have been added to the report.	<ul style="list-style-type: none"> • Project Profitability (PM624000)

Dashboards, Reports, and Generic Inquiries

The dashboards, reports, and generic inquiries that have been previously provided in the ConstructionDashboards customisation package are now included in the SalesDemo Dashboards package.

The following dashboards are now included in the SalesDemo Dashboards package:

- Project Dashboard (CU000013)
- Project Overview Dashboard (CU000076)
- Project Manager (DB000022)

The following generic inquiries are now included in the SalesDemo Dashboards package:

- DB-ActualVsBudget (GI000060)
- DB-Appointments (GI000073)
- DB-AppointmentTechs (GI000074)
- DB-Approvals (GI000067)
- DB-APSupplierDetail (GI000054)
- DB-APSupplierSummary (GI000053)
- DB-ARCustSummary (GI000049)
- DB-ARexpectedReceipts (GI000058)
- DB-BillsToPay (GI000019)
- DB-Cases (GI000027)
- DB-CashByPeriod (GI000080)
- DB-ContractExpired (GI000020)
- DB-employeeTime (GI000034)
- DB-GLHistory (GI000061)
- DB-InventoryStockSales (GI000052)
- DB-Lead (GI000075)
- DB-Opportunities (GI000026)
- DB-OrderToShip (GI000021)
- DB-POlate (GI000029)
- DB-POtrend (GI000079)
- DB-ProjectEmployees (GI000066)
- DB-ProjectEmployeeTime (GI000041)
- DB-ProjectProfit (GI000076)
- DB-ProjectStatus (GI000030)
- DB-ProjectTasks (GI000033)
- DB-ProjectTime (GI000039)
- DB-Putaway (GI000063)
- DB-Receipts-NoBill (GI000062)
- DB-Replenishment (GI000028)
- DB>Returns (GI000078)
- DB-SalesActivities (GI000023)
- DB-SalesVsQuota (GI000050)
- DB-Shipments (GI000031)
- DB-ShipOnTime (GI000051)
- DB-SOtotal (GI000018)
- DB-Tasks (GI000024)
- DB-TimesheetStatus (GI000065)
- DB-Transfers (GI000038)
- DB-SupplierHistory (GI000068)

The Project Issue screen (PJ3020PL) has been moved to the core product as a list of records for the Project Issue screen (PJ302000), and is no longer included in any customisation package.

Dashboards in the Mobile App

The following dashboards are now included in the mobile app if the SalesDemo Dashboards package is published:

- Support Manager (DB000009)
- Support Tech (DB000010)
- Sales Manager (DB000011)
- Sales Operations (DB000012)
- Salesperson (DB000013)
- Marketing Manager (DB000014)
- AR Clerk (DB000016)
- AP Clerk (DB000017)
- Warehouse Manager (DB000018)
- Purchasing Manager (DB000019)
- Shipping Clerk (DB000020)
- Receiving Clerk (DB000021)
- Project Consultant (DB000023)
- Management (DB000028)
- Field Service Manager (DB000029)
- Field Service Technician (DB000030)
- Construction Project Manager (DB000034)
- Project Dashboard (CU000013)
- Project Overview Dashboard (CU000076)

Changes and New Objects in the System Data

The following objects have been added and the following changes have been introduced during the upgrade:

1. The configuration of automation steps for Request for Information (PJ301000), Project Issue (PJ302000), Drawing Log (PJ303000), and Drawing Logs (PJ403000) have been reset to the default workflow: The IDs of these screens, which were specified on the Automation Steps screen (SM205000), have been deleted from the user data and the default configuration has been added to the system data.
2. The RI Default, DL Default, and PI Default automation definitions on the Automation Definitions screen (SM205010) have been reset to the default ones: The definition IDs specified on the screen have been deleted from the user tenant data, and the default configuration has been added to the PJ Default automation definition of the system tenant.

3. The numbering sequences with the following IDs specified on the Numbering Sequences screen (CS201010) have been added to the system data and updated in the user tenant:
 - DFREPORT
 - DRAWINGLOG
 - PHOTO
 - PHOTOLOG
 - PROISSUE
 - REQFORINFO
 - SUBMITTAL
4. The following configuration data has been deleted from the user tenant and added to the system tenant:
 - DrawingLogStatus on the Status tab of the Drawing Log Preferences screen (PJ102000)
 - PhotoLogStatus on the Status tab of the Photo Log Preferences screen (PJ103000)
 - PJSubmittalType on the Submittal Settings tab on the Project Management Preferences screen (PJ101000)
5. The DrawingLogDiscipline configuration data has been added to the system tenant with user configuration to preserve the order of the lines specified by the user on the Discipline tab of the Drawing Log Preferences screen (PJ102000). The user data has been updated with the new ID from the system tenant.

Updated and Removed Columns in Database Tables

The following table lists the columns whose names are updated during the upgrade.

Column Name pre-2020.6	Column Name 2020.6
Contract database table	
UsrIncludeQtyInAIA	IncludeQtyInAIA
UsrAIALevel	AIALevel
PMBudget database table	
UsrCostProjectionCompletedPct	CostProjectionCompletedPct
UsrCostProjectionQtyToComplete	CostProjectionQtyToComplete
UsrCostProjectionQtyAtCompletion	CostProjectionQtyAtCompletion
UsrCuryCostProjectionCostToComplete	CuryCostProjectionCostToComplete
UsrCostProjectionCostToComplete	CostProjectionCostToComplete
UsrCuryCostProjectionCostAtCompletion	
UsrCostProjectionCostAtCompletion	
UsrCostProjectionApprovalMapID	
UsrCostProjectionApprovalNotificationID	
CROpportunity database table	

Column Name pre-2020.6	Column Name 2020.6
UsrCost	Cost
UsrMultipleAccounts	MultipleAccounts
UsrQuotedAmount	QuotedAmount
UsrTotalAmount	TotalAmount

PMChangeRequest database table	
UsrConvertedFrom	ConvertedFrom
UploadFileRevision database table	
UsrIsCurrent	IsDrawingLogCurrentFile

The following table lists the columns that have been removed from the Contracts database table and replaced with the columns in PMAddress table.

Column Name pre-2020.6	Column Name 2020.6
Contract.UsrCity	PMAddress.City
Contract.UsrCountryID	PMAddress.CountryID
Contract.UsrLatitude	PMAddress.Latitude
Contract.UsrLongitude	PMAddress.Longitude
Contract.UsrPostalCode	PMAddress.PostalCode
Contract.UsrStateusr	PMAddress.State

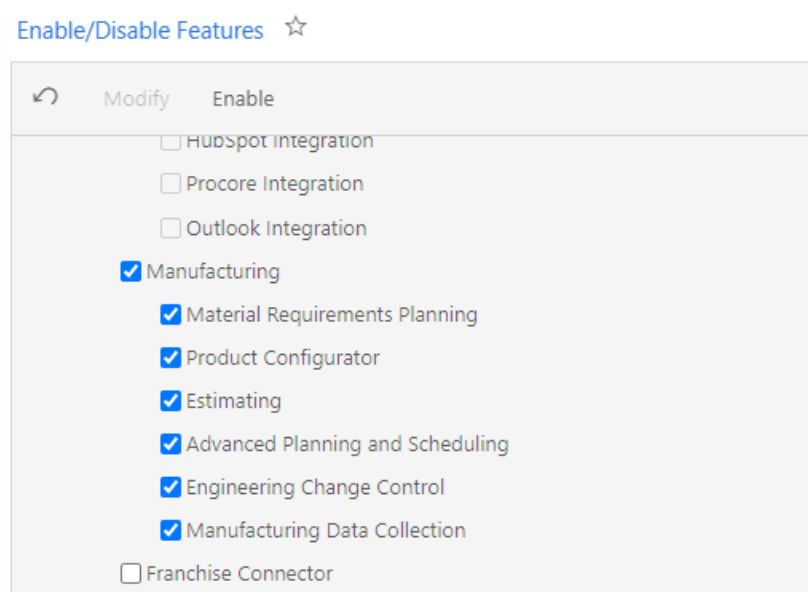
Manufacturing

As of this release, the manufacturing functionality is no longer provided as a customisation project. Instead, this functionality has now become part of the core product of MYOB Advanced.

Before performing the upgrade to MYOB Advanced Manufacturing Edition MYOB Advanced 2020.6, the appropriate users and administrative users should read the information described in the sections of this topic.

Enabling the Manufacturing Functionality

The manufacturing-related functionality is available when the Manufacturing feature and any of the nested features (which are shown in the following screenshot) are enabled on the Enable/Disable Features screen (CS100000).



General Upgrade Notes

Because the manufacturing functionality has been moved to the core product, the following customisation packages have been eliminated and must be unpublished before the upgrade to 2020.6:

- Manufacturing
- Manufacturing Wiki
- Manufacturing Portal

Preparing the System for the Upgrade

Before an administrative user starts to upgrade the system to MYOB Advanced 2020.6, the following preparations should be made in the system:

1. The administrative user must unpublish all customisations that have been applied to the current version.
2. If generic inquiries, reports, or other system objects (such as those in the list below) have been created for the manufacturing functionality in previous versions of MYOB Advanced that must be kept after the upgrade, the user must export these objects as XML files. (These are objects that are created by customisers and not delivered by MYOB Advanced.)

The following system objects are affected by the upgrade procedure:

- Reports (.rpx files)
- Generic inquiries
- Shared filters
- Pivot tables
- Import and export scenarios
- Automation definitions

- Customisation package files
- Customisation package contents
- Wikis
- Site map
- Dashboards
- Any other manufacturing-related entities that can be exported as XML files

Changes that Affect Customisations

If MYOB Advanced Manufacturing Edition of the previous versions has been customised the following changes would affect any customisations that reference the updated namespace, graph extensions, or cache extensions; they may need to be updated to reflect the new names after upgrade to 2020.6:

1. The namespaces listed in the following table have been renamed.

Old Name	New Name
JAMS.AM	PX.Objects.AM
JAMS.AM.Attributes	PX.Objects.AM.Attributes
JAMS.MRP	PX.Objects.AM
JAMS.MRP.Attributes	PX.Objects.AM.Attributes
JAMS.AEF	PX.Objects.AM.CacheExtensions or PX.Objects.AM.GraphExtensions

2. Table extensions have been removed and merged to the base table.
3. Cache extension names have been changed from ending in AMExtension to Ext.

Important Notes After the System Upgrade

If the organisation is upgrading from a prior version, a user should do the following:

1. When opening the Bill of Material (AM208000) or Production Order Maintenance screen (AM201500) after the upgrade, the user will receive a message to navigate to the Production Preferences screen (AM102000).
2. In this message, the user should click the Production Preferences link (or navigate to the Production Preferences screen) and click the **Upgrade** button on the screen toolbar.

CRM

As of this release, a user can select any employee of the company to be the owner for the record, such as a lead, contact, or business account.

General Upgrade Notes

In previous versions of MYOB Advanced, on the screens—including CRM screens—that have an element containing the identifier of the owner, a user could select the person who will be responsible for the record (such as a lead, contact, or business account) among only system users.

Starting in MYOB Advanced 2020.6, the implementation of the OwnerID field has been changed to allow employees to be selected. (For compatibility reasons, the list of employees is still restricted to the list of users.) During the upgrade, the system changes the field type from uniqueidentifier to int. Some generic inquiry screens, dashboards, widgets, import and export scenarios, and API services retrieve data from the fields containing the identifier of the owner.

Upgrade Procedure

During the upgrade procedure, the system performs the following actions:

- Re-establishes the relationships between parent table fields and the child table fields of database tables that contain the OwnerID field
- In import and export scenarios, changes the type of the Contact.DisplayName field from uniqueidentifier to int
- In the API, changes the type of the Contact.DisplayName field from uniqueidentifier to int type

Important Notes After the System Upgrade

After an upgrade to MYOB Advanced 2020.6, users may encounter issues that are related to opening generic inquiries, dashboards, widgets, processing import and export scenarios, or API services. These issues are caused by data being retrieved from the following fields, for which the field type has been changed from uniqueidentifier to int.

Table	Field
EPApproval	ApprovedByID
EPExpenseClaim	ApprovedByID
ARRegister	ApproverID
EPExpenseClaim	ApproverID
WZTask	AssignedTo
WZTask	CompletedBy
EMailAccount	DefaultOwnerID
EPApproval	DocumentOwnerID
APRegister	EmployeeID

Table	Field
CRReminder	Owner
ARInvoice	OwnerID
BAccount	OwnerID
CADeposit	OwnerID
Contact	OwnerID
Contract	OwnerID
CRActivity	OwnerID
CRCampaign	OwnerID
CRCase	OwnerID
CRMarketingList	OwnerID
CROpportunityRevision	OwnerID
EPApproval	OwnerID
EPAssignmentRoute	OwnerID
EPEquipmentTimeSheet	OwnerID
EPExpenseClaimDetails	OwnerID
EPRule	OwnerID
PMChangeOrder	OwnerID
PMChangeRequest	OwnerID
PMProforma	OwnerID
PMTimeActivity	OwnerID
POLandedCostDoc	OwnerID
POReceipt	OwnerID
RQRequest	OwnerID
RQRequisition	OwnerID
SOOrder	OwnerID
SOShipment	OwnerID
INItemClass	PriceManagerID
INItemSite	PriceManagerID
InventoryItem	PriceManagerID
INItemSite	ProductManagerID

Table	Field
InventoryItem	ProductManagerID

Identifying and Resolving Issues

Generic Inquiries

Symptoms: If a user tries to open a generic inquiry screen, either of the following errors is displayed:

- Operand type clash: uniqueidentifier is incompatible with int
- Conversion failed when converting the nvarchar value " to data type int

Root Cause: During the upgrade, the existing system configuration could not be automatically upgraded: Some links between tables could be joined incorrectly after the change of the field type for the fields that contain the identifier of the owner. Even after the links have been updated during the upgrade, some relationships between two tables may remain untouched. This may lead to a type mismatch between the parent table field and the child table field.

Solution: On the Generic Inquiry screen (SM208000), the customiser should do the following:

1. On the screen toolbar, click Export as XML to export the generic inquiry. A customiser may need to have a backup of the generic inquiry before performing the following instructions.
2. On the Tables tab, add the PX.Objects.CR.Contact table.
3. On the Relations tab, do the following:
 - a. In the Data Field Links For Active Relation table, replace the following table fields.

Old Value	New Value
Employee.UserID	Employee.DefContactID
Contact.UserID	Contact.ContactID

- b. In the Table Relations table, for the table field User.PKID, do the following:
 - i. Delete the row that has the settings for the table field User.PKID.
 - ii. Add a new row that has the following settings:
 - Parent Table: Contact
 - Join Type: Left
 - Child Table: User

Note: If the joined tables were used only to expose DisplayName or FullName of the document owner in the results of the generic inquiry, a customiser can delete the joined table and add the field, such as OwnerID, to the settings of generic inquiry. This field now contains the selector attribute with the Contact DisplayName value.

4. In the Data Field Links for Active Relation table, add a new row that has the following settings:
 - Parent Field: UserID
 - Condition: Equals
 - Child Field: PKID

5. Save the changes to the generic inquiry.

Dashboards and Widgets

Symptoms: A widget does not display data. Either of the following errors may also be displayed:

- Operand type clash: uniqueidentifier is incompatible with int
- Conversion failed when converting the nvarchar value '' to data type int

Root Causes:

- The issue is with the generic inquiry used for this widget. The customiser should make sure that the generic inquiry corresponding to the widget opens without an error being generated.
- In rare cases, the symptoms may be caused by issues with the widget filter.

Solution: Do either of the following:

- Refer to the previous section to resolve the issues with the generic inquiry used for the widget.
- Review the widget filters for the correctness of the fields used in them.

Note: If a field (such as the OwnerID) of an entity was used as the Dashboard parameter on the Dashboards screen (SM208600), the entity will be changed to the PX.Objects.CR.BackwardCompatibility.DACWithOwnerID DAC during the upgrade. This DAC is made for the behaviour backward compatibility. To replace the changed value back, the customiser should be sure to also replace the corresponding widget filters.

Import and Export Scenarios

Symptoms: A field is imported or exported incorrectly: as an integer value instead of text, or as an empty value. Either of the following errors may also be displayed:

- Operand type clash: uniqueidentifier is incompatible with int
- Conversion failed when converting the nvarchar value '' to data type int

Root Cause: The field used in the scenario mapping after the upgrade is a simple selector attribute with the int type and the Contact.DisplayName description.

Solution: Depending on the scenario mapping, on the Import Scenarios (SM206025) or Export Scenarios screen (SM207036), do either of the following:

- If the AcctCD field was used, with a value such as 'EP00000001' in the **Field/Action Name** field (Mapping tab), replace this value with FieldName → Employee ID.
- If the affected field (without any deeper formulas) was used, with GUID values such as 'cdf056fd-702e-4dbb-ada4-c8621c1b945e' in the **Field/Action Name** field (Mapping tab), replace this value with Field Name → PKID.

API Services

Symptoms: The PUT request cannot be performed with the OwnerID field specified, or the value of this field is empty after the PUT request has been performed.

Root Cause: The field used in the API after an upgrade is a simple selector attribute with the int type and the Contact.DisplayName description.

Solution: Only integer values are acceptable for the field after the upgrade. If the AcctCD value, such as 'EP00000001', was used before the upgrade, the field value should be replaced with the corresponding ContactID value.

Workflow Engine

This release improves the workflow engine, and workflows for the following screens have been redesigned:

- Sales Orders (SO301000)
- Shipments (SO302000)
- Invoices (SO303000)

Before performing the upgrade to MYOB Advanced 2020.6, developers should read the information described in this topic.

General Upgrade Notes

Note: All automation steps for these screens are disabled after the upgrade. The customiser should repeat all the customisation steps (such as configuring statuses, adding combo box values, and enabling or disabling fields) made in the old automation engine by using the automation steps, in the upgraded version with the new workflow engine.

After an upgrade, the following issues can occur in these screens, if the customisation of automation steps has been used in the previous version:

- Custom statuses become unavailable, and the value of the **Status** field becomes empty for a document. As a consequence, the actions for the document include all available system values.
- Statuses that have been disabled for a document become enabled, and the document can have any of the system statuses.
- Custom actions become unavailable. Actions that have been deleted or disabled become available or enabled again, and enabled actions become unavailable.
- Added combo box values become unavailable. Values that have been deleted become available again.
- Fields that have been enabled or disabled become disabled or enabled, respectively. Required fields become optional, and optional fields become required.

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the Sales Orders (SO301000), Shipments (SO302000), or Invoices (SO303000) screen, users that work on customisations will need to redesign the automation of the processes related to the applicable screens by using the new workflow engine.

The Sales Orders (SO301000), Shipments (SO302000), and Invoices (SO303000) screens do not support automation steps anymore. If a customisation contains changes to the automation steps of these screens, developers should rewrite this customisation to use the new automation workflows. Changes to these screens also affect any import and export scenarios that have been created for these screens. Developers should modify the scenario mappings to use workflow actions for modification of the statuses.

Reports

The CounterEmailsForReport report table has been discontinued, which affects the following reports:

- Accounts Receivable Invoice/Memo (AR641000)
- Sales Orders Invoice & Memo (SO643000)
- Project Invoice/Memo (PM641000)

The default versions of these reports have been updated, but if you have customised these reports (or if you have created custom reports that use the affected table) you will need to update them manually. This can be done in one of two ways:

- Edit the reports and change references to the CounterEmailsForReport table to use the updated ARInvoice table instead.
- Revert the reports to the defaults after upgrading to 2020.1, then re-apply your customisations.

See the White Paper “Updating Reports in 2020.1” for more information on editing reports. This document is available on the [MYOB Advanced Education Centre website](#).