MYOB Advanced

Upgrade Notes

2021.1.1

Contents

Introduction

Welcome to the 2021.1.1 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

Finance

Support for Price Lists for Net/Gross Prices

After an upgrade to MYOB Advanced 2021.1.1, for all sales prices and sales price worksheets existing in the system, the system sets the value in the **Tax Calculation Mode** field on the Sales Prices (AR202000) and Sales Price Worksheets (AR202010) screens to "Not Set".

Paid Amounts and Line-Level Balances in AR Reports

After an upgrade to MYOB Advanced 2021.1.1, the default or customized AR Docs by Project With Paid Amt (AR734100) report will be removed from the site map, but will remain available in the UserReport database table. To get access to the AR Docs by Project With Paid Amt report after the upgrade, the system administrator should add it to the site map.

Distribution

Improvements in Drop-Ship Processing

Preparations Before the System Upgrade

We recommend that the existing drop-ship purchase orders on the Purchase Orders screen (PO301000) be linked to sales orders on the Sales Orders screen (SO301000) before the upgrade to MYOB Advanced 2021.1.1. We also highly recommend that all drop-ship documents be processed before the upgrade. During the upgrade, if a drop-ship purchase order has at least one line linked to a sales order line or has a released purchase receipt, the system will mark it as a legacy drop-ship purchase order in the database.

Sales order lines that are partially linked to drop-ship purchase order lines—that is, a drop-ship purchase order has been created for some of the quantity of the sales order line— will be marked as legacy sales order lines. After the upgrade, the legacy drop-ship purchase orders lines can be linked to only legacy sales orders lines, and legacy sales order lines can be linked to only legacy drop-ship purchase orders lines.

If a sales order line is marked for drop shipping and is not linked to a purchase order, after the upgrade, this line can be drop-shipped as usual. A new purchase order can be created for this line, or the line can be linked to another non-legacy drop-ship purchase order.

If a sales order line is marked for drop shipping and is partially linked to a purchase order, after the upgrade, a user can link the remaining part of the line's quantity to a legacy drop-ship purchase order or can make the quantity in the sales order line equal to the linked quantity and add a new line with the remaining quantity.

If a drop-ship purchase order is not linked to a sales order and does not have released purchase receipts associated with it, after the upgrade, the purchase order will not be marked as a legacy purchase order. A user can link this purchase order to non-legacy sales order lines, or can create a new sales order for this purchase order by using the **Create Sales Order** action on the Purchase Orders screen.

If at least one line in a drop-ship purchase order was linked to a sales order line or the purchase order had partially or completely released purchase receipts before the upgrade, after the upgrade, this purchase order can be linked to only legacy sales orders. If no legacy sales orders are available for linking, the **Create Sales Order** action will be available if the legacy drop-ship purchase order has the "Open", "Completed", or "Closed" status; in this case, the action will cause the system to create a legacy sales order for only the purchase order lines with stock and non-stock items that are not linked to a sales order.

After the upgrade, a user should note the following rules of drop shipping:

- If there is at least one partially released purchase receipt for a sales order line on the Details tab of the Sales Orders screen, the user will not be able to clear the **Mark for PO** check box for this line and to ship the rest of line quantity from the warehouse.
- If there is at least one shipment confirmed for a sales order line, the user will not be able to select the **Mark for PO** check box for this line and to drop ship the rest of the line quantity.
- The user will not be able to cancel a sales order if an unreleased purchase receipt is prepared for a drop-ship purchase order that is linked to this sales order.

Project Management

Closing Commitments

After the upgrade to MYOB Advanced 2021.1.1, if users want to apply the new calculation logic to existing commitments of particular projects, they should select these projects on the Recalculate Project Balances screen (PM504000), select the **Rebuild Commitments** check box in the Selection area, and click **Process** on the form toolbar.

For the selected projects, the system recalculates values displayed in the Committed Received Quantity, Committed Invoiced Quantity, Committed Invoiced Amount, Committed Open Quantity, and Committed Open Amount columns in the table of the Commitments screen (PM306000). The values in the Committed Variance Quantity and Committed Variance Amount columns are calculated and the value in the Status column is retrieved for a commitment each time the commitments is displayed on the Commitments form.

Default Accounts and Subaccounts

As a result of the upgrade to MYOB Advanced 2021.1.1, for each project, project template, project task, project template task, and common task, the value in the **Default Account** field (which has been removed) is copied to the **Default Sales Account** and **Default Cost Account** fields on the Settings tab of the Projects (PM301000) and Project Templates screens (PM208000) and on the Summary tab of the Project Tasks (PM302000), Project Template Tasks (PM208010), and Common Tasks (PM208030) screens, respectively.

Also, for each project, project template, project task, project template task, and common task, the value from the **Default Subaccount** field (which has also been removed) is copied to the **Default Sales Subaccount** and **Default Cost Subaccount** fields on the Settings tab of the Projects and Project Templates screens and on the Summary tab of the Project Tasks, Project Template Tasks, and Common Tasks screens, respectively.

People

WFM Customisation

For sites that integrate with MYOB Advanced Workforce Management, using a customised installation of MYOB Advanced 2020.8, the customisation must be updated as follows for Advanced 2021.1.1:

1. Uninstall the **MYOB.Advanced.AT.2020.8.R2** customisation <u>before</u> upgrading to 2021.1.1.
2. After upgrading to 2021.1.1, install the **MYOB.Advanced.AT.2021.109.R2** customisation.

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 or later, 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](#).