

# MYOB Advanced Business

## Release Notes

2016.1

Cloud Solutions  
for Bigger Business

**MYOB** Advanced <sup>Live</sup>

# Contents

|  |    |
|--|----|
| Introduction   | 4  |
| What's New in this Release? .....                          | 4  |
| Installing this Release .....                              | 4  |
| New Features   | 5  |
| Licensing Updates .....                                    | 5  |
| New Licence Type .....                                     | 5  |
| Licence Type Updates .....                                 | 5  |
| New Sales Profitability Reports .....                      | 5  |
| New Reports .....  | 5  |
| Other Report Improvements .....                            | 6  |
| Integration with Microsoft Power BI .....                  | 7  |
| Bank Transaction Processing .....                          | 7  |
| Improving the Usability of Processing Bank Statements..... | 7  |
| User Interface Changes.....                                | 8  |
| Integration with HubSpot .....                             | 8  |
| Enhanced Project Stock Management.....                     | 9  |
| Integration with Exchange Server.....                      | 10 |
| Reclassifying GL Transactions .....                        | 10 |
| Extended Mobile Application .....                          | 11 |
| Support of Multiple Companies and Branches.....            | 11 |
| New Applets.....   | 11 |
| Documentation for the MYOB Advanced OnTheGo App .....      | 12 |

|                                      |    |
|--------------------------------------|----|
| Workflow Changes.....                | 13 |
| Organisation Suite .....             | 13 |
| Finance Suite.....                   | 13 |
| Distribution Suite .....             | 14 |
| Configuration and System Suites..... | 15 |
| User Interface Changes.....          | 15 |
| Renaming of Interface Elements ..... | 15 |
| Reordering of User Menu .....        | 15 |
| Usability Improvements .....         | 16 |
| Performance Improvements.....        | 16 |
| Resolved Issues                      | 18 |
| Known Issues                         | 25 |

# Introduction

Welcome to the 2016.1 release of MYOB Advanced Business.

## What's New in this Release?

The 2016.1 release is a major update to MYOB Advanced, which adds enhancements to many areas of the system and addresses issues identified in previous releases. The following sections provide details of the changes included in this release.

## Installing this Release

The 2016.1 service pack is automatically deployed to all production accounts.

**Note:** An updated licence is required to enable configuration options for the new features. While accounts in our managed environment will have their licences updated automatically, a local installation must be updated manually by navigating to the Licence Maintenance (SM.20.15.10) form and clicking the **Update Licence** button.

# New Features

## Licensing Updates

### New Licence Type

This release adds a new licence type that provides access to reports and employee self-service features, and read-only access to other features. The new “Executive User” type is available in all editions of MYOB Advanced.

The “Executive User” type has the same access as the “Employee User” licence type, plus read-only access to all other screens and reports, including third party embedded add-ons, reports, generic inquiries, and so on.

**Note:** A corresponding “Executive User (API)” licence type is available to give the same access as the “Executive User” type, when accessing MYOB Advanced via the Advanced API.

### Licence Type Updates

The Full User, Warehouse User, Project User and Partner Support licence types now grant access to the Work Calendar form (CS.20.90.00).

## New Sales Profitability Reports

Completely new sales profitability reports have been added to the Finance suite. The reports will provide your company with any data that might be needed to improve the quality of the sales profitability analysis, monitor sales of specific products, and identify trends in customer buying behaviour.

### New Reports

The following reports (available in the Summary and Detailed formats) are added:

- **Sales Profitability by Item and Order (AR.67.10.00):** This report shows the net sales amounts, costs, and margins for the items that were sold during the specified date range. The report in detailed format shows the data broken down by sales orders. Additionally, the data can be filtered by customer.
- **Sales Profitability by Customer and Order (AR.67.20.00):** This report shows the net sales amounts, costs, margins, and margin percentages on the sales to each customer during the specified date range. The report in detailed format shows the data broken down by sales order. Additionally, the data can be filtered by inventory item.
- **Sales Profitability by Salesperson and Customer (AR.67.30.00):** This report shows the net sales amounts, costs, margins, and margin percentages calculated for the sales performed by particular salespersons during the specified date range. The report in detailed format shows the data broken down by customer. Additionally, the data can be filtered by inventory item.

- **Sales Profitability by Item Class and Item (AR.67.40.00):** This report shows the net sales amounts, costs, margins, and margin percentages calculated on per inventory item and item class basis on the sales occurred during the specified date range. The report in detailed format shows the data broken down by sales orders. Additionally, the data can be filtered by customer.
- **Sales Profitability by Customer Class and Customer (AR.67.50.00):** This report displays the net sales amounts, costs, margins, and margin percentages on all sales to each customer class and each customer during the specified date range. Additionally, the data can be filtered by inventory item.
- **Daily Sales Profitability (AR.67.60.00):** This report displays the net sales amounts, costs, margins, and margin percentages calculated on the documents of specific type for the specified date range and broken down by customer. The report in detailed format shows the profitability data for each day within the specified date range. Additionally, the data can be filtered by inventory item.

## Other Report Improvements

| Area/Form  | Change   |
|--|--|
| AR Aged Past Due (AR.63.10.00)<br>AR Aged Past Due MC (AR.63.11.00)<br>AR Aged Outstanding (AR.63.15.00)<br>AR Aged Outstanding MC (AR.63.16.00)                             | With the <b>Age Credits</b> check box cleared on the Accounts Receivable Preferences form (AR.10.10.00), the value in the <b>Ageing Date</b> box of the applicable report form will now be printed in the <b>Due Date</b> column of the applicable report for unapplied credit memos and payments.                 |
| Invoice/Memo (AR.64.10.00)<br>Purchase Order (PO.64.10.00)<br>Item Request (RQ.64.10.00)<br>Quote (SO.64.10.00)<br>Sales Order (SO.64.10.10)<br>Invoice & Memo (SO.64.30.00) | The following changes were made: <ul style="list-style-type: none"> <li>• The redundant <b>Date</b> column header was removed.</li> <li>• In the footer, the <b>Company Total</b> (CUR) label was removed.</li> <li>• In the footer, the <b>Report Total</b> label was renamed to <b>Company Total</b>.</li> </ul> |
| CA Edit (CA.61.20.00)<br>CA Edit Detailed (CA.61.25.00)  | In these reports, a new <b>Include Transactions on Hold</b> parameter was added, so you can include transactions that have the “Hold” status.  |
| Report forms   | If the <b>Shared</b> check box is selected for a report template, the <b>Default</b> check box becomes unavailable. Only non-default templates can be shared.  |
| Analytical reports, inquiries, scenarios, Report Designer  | The following functions have been changed: <ul style="list-style-type: none"> <li>• <code>Now ( )</code> and <code>Today ( )</code> return the time in the user’s time zone.</li> <li>• <code>NowUTC ( )</code> and <code>TodayUTC ( )</code> return the time in UTC (without any time zone offset).</li> </ul>    |

# Integration with Microsoft Power BI

Microsoft Power BI is a collection of desktop and online services and features that you use to find and visualize data, share discoveries, and collaborate in intuitive new ways. The Power BI cloud service includes an MYOB Advanced content pack that you can use to quickly connect and immediately gain insights into your business data. This content pack includes an out-of-box dashboard, a set of reports and the dataset to explore and provide details of CRM opportunities such as your total won opportunities by date.

Using the Microsoft Power BI desktop report writer and the OData functionality of MYOB Advanced, power users can extract information from MYOB Advanced, then create and publish report sets to Power BI Cloud.

**Note:** To enable integration with Power BI, the MYOB Advanced API has been updated. In the class `PXUsers : PXCacheExtension<Users>`, the **username** field has been renamed to **login**. Any customisations that access the Users form (SM.20.10.10) via the API will need to be updated to reflect this change.

## Bank Transaction Processing

The processing of bank transactions has been significantly improved. All the changes are intended to increase the usability of processing bank statements.

### Improving the Usability of Processing Bank Statements

In MYOB Advanced 2016.1, the usability of the bank statement handling process has been improved based on customer feedback.

The major improvements that have been implemented include the following:

- The processes of uploading statement files and importing statements from an Excel file have been improved.
- On the Process Bank Transactions (CA.30.60.00) form:
  - When a user selects a bank transaction, the most relevant tab is now opened by default based on the available matches.
  - Matched, Unmatched, and All options have been added to the filter on the table toolbar, so you can view matched, unmatched, or all transactions in the statement you are working with.
  - Unmatched records in a partially processed statement can now be edited.
  - The colour codes used to differentiate the status of the current transactions have been replaced by the check box in the  column and the **Match Type** column.
  - Tips displayed in the status panel have been added.
- On the Import Bank Transactions (CA.30.65.00) form, processed transactions can now be unmatched by using the new **Unmatch** button on the table toolbar.

## User Interface Changes

The following user interface changes have been made to the Process Bank Transactions form (CA.30.60.00):

| Area          | Original Caption      | New Caption                         |
|---------------|-----------------------|-------------------------------------|
| Form toolbar  | Process Matched Lines | Process                             |
| Table toolbar | Clear Match           | Unmatch                             |
| Table toolbar | Clear All Matches     | Unmatch All                         |
| Table toolbar | Hide Transaction      | Hide                                |
| Table columns | Matched               | <input checked="" type="checkbox"/> |

## Integration with HubSpot

In MYOB Advanced 2016.1, the feature of integration with HubSpot has been introduced, which gives you the ability to export leads from MYOB Advanced to HubSpot for nurturing and then import the leads back to MYOB Advanced for further processing.

You can export and import leads by using integration scenarios. For information on how to prepare an integration scenario, see the *Integration > Overview > Scenarios for Data Import* and *Integration > Overview > Scenarios for Data Export* topics in the User Guide.

When creating an integration scenario, you need to specify an appropriate data provider. To create a data provider that supports integration with HubSpot, you need to use a specific built-in provider type: *HubSpot Provider*.

You can create a data provider that supports integration with HubSpot by using the Data Providers form (SM.20.60.25) as follows:

1. In the **Name** box, type the name of the data provider (for instance, HubSpot).
2. In the **Provider Type** box, select PX.DataSync.HubSpot.HSSYProvider.
3. On the **Parameters** tab, specify the following settings:
  - Hapikey: Your HubSpot API key
  - PortalID: Hub ID
  - HubSpotList: The name of the list to be used for synchronisation between MYOB Advanced and HubSpot (if no such list exists yet, it will be created automatically during the first export or import)
4. On the Schema tab, click **Fill Schema Objects** and then **Fill Schema Fields**.

**Note:** You can deactivate any fields that you are not going to use in your integration scenario.

5. Click **Save** on the form toolbar to save the changes.

We recommend that you validate imported leads for duplicates by using the properly configured Lead/ Contact Duplicate Validation feature—for instance, allowing only unique emails and validating leads on entry. For more information about duplicate validation, see the *Customer Management > Managing Leads and Contacts > Duplicate Validation* topics in the User Guide.



# Enhanced Project Stock Management

## *Plus and Enterprise Editions only*

A project stock is a quantity of a material that is held in stock for a particular project task. As the material is issued against this task, you may want to track and manage the project stock that is available for the whole project.

In MYOB Advanced, a project stock is managed through the management of warehouse locations that can be associated with projects and project tasks, which makes it possible to automatically associate inventory transactions with relevant project tasks. To make the functionality of project stock management easier-to-use and to improve its reliability, the following enhancements have been introduced in this release:

- For inventory withdrawals, the default values for the Project and Project Task boxes on the Issues form (IN.30.20.00) are transferred from the issuing storage location.
- The system no longer allows assigning a different project task to a storage location on the Warehouses form (IN.20.40.00) if the location has a non-zero quantity on hand or if an unreleased inventory transaction, purchase receipt or sales order shipment exists that affects this storage location in any way.
- Appropriate project tasks are automatically specified for inventory transfers and accounts payable bills with a purchase price variance.
- Appropriate project and project task are now automatically transferred from a blanket purchase order to a related normal purchase order.
- A new purchase receipt is now automatically assigned an appropriate storage location that is associated with a particular project task and located in the warehouse specified for the related purchase order.
- The system will display a warning message if a user tries to create a purchase order that includes a stock item associated with a project task without a storage location.
- During an inventory issue release, the system generates general ledger batches for the standard price difference account, and the batches no longer contain zero lines.
- If a project task is assigned to a sales order, the sales order is shipped by default to the location assigned to the specified project task.
- If approval is required for purchase orders, the system does not allow changing the project specified for a purchase receipt or for an accounts payable bill. If no approval is required for purchase orders, the project, as well as the project task, can be changed for an accounts payable bill that has been created for a purchase order without a purchase receipt.
- If an accounts payable bill is entered for a project-related purchase order, the lines of the bill are automatically associated with the project and project task specified for the purchase order. In the general ledger batch generated for a project-related accounts payable bill, the PO Accrual account is automatically associated with the project task specified in the corresponding line of the accounts payable bill.

# Integration with Exchange Server

*Plus and Enterprise Editions only*

The application now supports seamless and transparent synchronization of contacts, tasks, appointments, and e-mails with any Microsoft Exchange or Office 365 mail server. Synchronization policies can be assigned to individual users to control synchronization. This integration works with a standard desktop or mobile e-mail client and does not require any plug-ins on the client-side.

**Note:** Exchange Server integration is available via a beta program only at this stage. Contact your Business Partner to enquire about participating in this program

By integrating MYOB Advanced with Exchange Server, you can seamlessly and transparently synchronize contacts, tasks, appointments, and emails across platforms. You control the synchronisation process by setting up synchronisation policies and assigning those policies to your users. Automatic synchronisation ensures that updates are delivered on time.

For details about the integration of MYOB Advanced with Exchange Server, see the Email > Synchronising with Microsoft Exchange Server topic in the User Guide.

**Note:** MYOB Advanced can be integrated with Microsoft Exchange Server 2013 or later.

## Reclassifying GL Transactions

In MYOB Advanced, a General Ledger (GL) journal batch is generated for each transaction created in the system. A batch can contain one transaction or multiple transactions, and each transaction consists of at least two journal entries (a debit and a credit entry). In previous versions, in cases where the wrong journal entry was created, users had to complete the appropriate steps to reverse the transaction and create a new one. The new GL Reclassification feature enables users to quickly create a correcting transaction to move an amount from one General Ledger account to another GL account, from one subaccount to another subaccount, or from one company branch to another company branch. You can use the GL reclassification to make amendments if an amount has been posted to the wrong GL account, subaccount, or branch by mistake.

As a result of the reclassification process, the system will generate a new transaction of the "Reclassification" type based on the original GL transaction. The Reclassification transaction moves the amount from the wrong GL account, subaccount, or branch to the required one.

With this new feature, users are able to:

- Reclassify GL account, subaccount, and branch for posted journal entries.
- Exclude transactions that had been reclassified from the reports and inquiries.
- View the history of changes for each entry that had been reclassified.

For more details, see the General Ledger > Managing Transactions > Reclassification of GL Transactions topic in the User Guide.

**Note:** Because of the changes made to the Journal Transactions form (GL.30.10.00) delivered as a part of this feature, custom applications that interact with this form through the screen-based API might require recompilation with the updated form definition. Applications that rely on the contract-based API will not require any changes.

## Extended Mobile Application

The MYOB Advanced OnTheGo mobile app is an out-of-the-box solution that empowers your employees to access MYOB Advanced from mobile devices to enter and submit their expenses and manage their work documents. The mobile application includes applets, which are versions of MYOB Advanced data entry forms that have been tailored to mobile devices.

The MYOB Advanced OnTheGo mobile app is available for iOS and Android mobile devices. The mobile app provides real-time access to your MYOB Advanced instance and supports automatic data synchronisation.

The functionality of the MYOB Advanced mobile app has been significantly extended in this version.

### Support of Multiple Companies and Branches

In previous versions of the app, on signing in, the user accessed the default branch to which this user had access rights. If the user had access rights to multiple branches and companies, this user was not able to switch the branch or company.

As of this version, once the user is successfully signed in, the user can view the branch and company if multiple companies have been configured in the MYOB Advanced instance. If the user has access rights to multiple branches and companies, this user can select another branch or company to sign in to. The user also will be able to specify the branches for documents and transactions.

### New Applets

The MYOB Advanced OnTheGo mobile application includes new applets for the following MYOB Advanced forms:

- Business Accounts (CR.30.30.00)
- Projects (PM.30.10.00) *Plus and Enterprise Editions only*
- Project Tasks (PM.30.20.00) *Plus and Enterprise Editions only*
- Equipment Time Cards (EP.40.70.00) *Plus and Enterprise Editions only*
- Transactions (CA.30.40.00)
- Sales Orders (SO.30.10.00)
- Purchase Orders (PO.30.10.00)
- Purchase Receipts (PO.30.20.00)
- Requests (RQ.30.10.00) *Enterprise Edition only*
- Requisitions (RQ.30.20.00) *Enterprise Edition only*

With the extended functionality of the MYOB Advanced OnTheGo mobile application, users can now do the following (depending on the edition):

- Add prospective customers, create opportunities for contacts and prospects, and enter sales orders.
- View and create projects and project tasks, and specify billable time for equipment used for projects.
- Add and release cash transactions.
- Create requests, requisitions, and purchase orders and submit these documents for approval.
- Create purchase receipts and assign them to the appropriate employees for processing.

To improve navigation, lists of default favourites (that is, the applets that are used most frequently) have been added to the mobile application on iOS and Android.

## Documentation for the MYOB Advanced OnTheGo App

The MYOB Advanced User Guide now includes a section on the MYOB Advanced OnTheGo app, which is available online and as a PDF. The documentation covers most of the applets and will be extended with each update to cover the remaining applets (Projects, Project Tasks, Equipment Time Cards, Requests, and Requisitions).

# Workflow Changes

The following changes have been implemented to address issues raised by customers.

## Organisation Suite

| Area/Form  | Change   |
|--|--|
| Email Activity<br>(CR.30.60.15)                  | The <b>Insert&gt;Template</b> action has been removed from the Rich Text Editor. The user can instead click <b>Actions&gt;Select Source</b> on the form toolbar.   |
| Opportunities<br>(CR.30.40.00)                   | <i>Plus and Enterprise Editions only</i><br>The <b>Discount</b> box can now be used for informational purposes only; if a discount is specified, it is no longer transferred to the invoice or sales order. To apply manual discounts to invoices or sales orders created from an opportunity with a discount, the user needs to manually insert lines with negative amounts or manually specify line discounts. |
| Opportunities<br>(CR.30.40.00)                   | <i>Plus and Enterprise Editions only</i><br>An opportunity's tax zone now has one of the following default values (listed in the order of selection priority): the tax zone specified for the selected location, the tax zone specified for the default location of the selected business account, or the tax zone of the selling branch.  |
| Activity<br>(CR.30.60.10)                        | More types of records are now available for selection in the <b>Related Entity</b> box (including Receipt, GL Batch, and Shipment).  |
| Customer Management Preferences<br>(CR.10.10.00) | The <b>Require Unique Email Address on Contact Validation</b> check box has been added to the <b>Duplicate Validation Settings</b> tab. If this check box is selected, the system discards duplicates with non-unique email addresses upon verification.   |

## Finance Suite

| Area/Form  | Change   |
|--|--|
| AR Aged Past Due<br>(AR.63.10.00)<br>AR Aged Past Due MC<br>(AR.63.11.00)<br>AR Aged Outstanding<br>(AR.63.15.00)<br>AR Aged Outstanding MC<br>(AR.63.16.00) | When the <b>Age Credits</b> check box is cleared on the Accounts Receivable Preferences (AR.10.10.00) form, the value in the <b>Aging Date</b> box of the applicable report form will now be printed in the <b>Due Date</b> column of the applicable report for unapplied credit memos and payments. |
| Journal Transactions<br>(GL.30.10.00)  | The <b>Require Ref. Numbers for GL Documents with Taxes</b> check box has been added to the General Ledger Preferences (GL.10.20.00) form. If the check box is selected, the document reference number (the <b>Ref. Number</b> column) is required when you add tax-related journal transactions.    |
| Release Payments<br>(AP.50.52.00)  | Now the Quick Checks (AP.30.40.00) form opens when you click the reference number of a quick check.  |

|  |  |
|--|--|
| Account Details (GL.40.40.00)<br>Check Register (CA.30.30.00)<br>Commission Details (AR.40.30.00)<br>Payment Processing Log (AR.40.65.00)<br>Payment Method<br>Transaction History (AR.40.60.00)<br>Post Taxes (TX.50.15.00) | On the toolbars of the listed forms, there were buttons (such as <b>View Document</b> or <b>View Customer</b> ) that had to be used to open and view a record selected in the table. The reference numbers of records in the tables of the listed forms now work as hyperlinks, which you can click to open and view record details. The corresponding buttons have been removed from the form toolbars. |
| CA Edit (CA.61.20.00)<br>CA Edit Detailed (CA.61.25.00)  | An <b>Include Transactions on Hold</b> check box has been added to include transactions with the On Hold status in these reports.  |
| Trial Balance (GL.30.30.10)  | You can now import a trial balance in a reporting ledger whose currency differs from the base one.   |
| Tax Adjustments (TX.30.10.00)  | Tax adjustments could not be released if they were saved to a tax period for which the tax report had been voided afterward and prepared again.  |
| Create E-File (AP.50.75.00)<br>1099 MISC Form (AP.65.30.00)  | In the <b>Branch</b> box on these forms, a user is able to select the consolidation branch ( <b>Consol. Branch</b> ) assigned to the company posting ledger. In this case, the data summarised for all the branches that post to the ledger will be reported under the consolidation branch company.   |

## Distribution Suite

| Area/Form                            | Change   |
|--------------------------------------|--|
| Item Warehouse Details (IN.20.45.00) | A new <b>Override Inventory Account/Sub</b> check box has been added to the <b>GL Accounts</b> section on the General Settings tab of the form. If the check box is selected, the system uses the inventory account and subaccount from the item warehouse settings; otherwise, the system uses the inventory account and subaccount from the source that is selected in the settings for the posting class, which are specified on the Posting Classes form (IN.20.60.00). The check box is cleared by default if the <b>Multiple Warehouses</b> or <b>Multiple Warehouse Locations</b> features are not enabled. |
| Inventory Summary (IN.40.10.00)      | A new "SO Prepared" plan has been added. All sales orders with statuses of On Hold, Credit Hold, or Pending Approval are included in this plan. It is possible to set up the availability  |

## Configuration and System Suites

| Area/Form  | Change  |
|--|---|
| Mass-processing forms                              | Any filters applied to columns and tabs are reset after the mass processing of records is complete.   |
| Favourites list                                    | It is now forbidden to add a generic inquiry that has not been added to the site map to the favourites list.  |
| The <b>Schedules</b> menu on mass-processing forms | The <b>History</b> and <b>View</b> menu commands are disabled if there are no schedules for the form.   |
| System Email Accounts (SM.20.40.02)                | If a user selects the <i>IMAP</i> option in the <b>Incoming Mail Protocol</b> box, the system displays the <b>Root Folder (on server)</b> box marked as mandatory; otherwise, the <b>Root Folder (on server)</b> box is hidden. |
| Mailing configuration settings                     | The <i>Text</i> option has been removed from the list of supported email formats.   |
| Notification Templates (SM.20.40.04)               | The <b>Status</b> box has been removed from this form, as it is obsolete.   |

## User Interface Changes

The following changes have been implemented to improve system usability.

### Renaming of Interface Elements

| Area/Form                        | Change  |
|----------------------------------|---|
| Release Tax Report (TX.50.20.00) | To avoid confusion, the <b>Close Period</b> button has been renamed to <b>Release</b> . The functionality of this button includes not only closing the period, but also generating a bill for the tax agency. |
| Leads (CR.30.10.00)              | The "Closed" status has been renamed to "Lost". This change may affect some integration scenarios.  |
| Users (SM.20.10.10)              | The <b>Username</b> field been renamed to <b>Login</b> .  |

### Reordering of User Menu

The items in the user menu at the top-right of the interface have been reordered: the **Sign Out** option has moved from the bottom of the menu to the top, and the list of companies that the user can log in to has been moved from the top to the bottom.

## Usability Improvements

| Area/Form                                   | Change  |
|---|---|
| Time reporting in activities and time cards | Now a user can enter one digit, 1 or 2, to specify the number of hours when reporting time in activities and time cards. However, the user has to skip the next digit place to specify minutes in the same row.   |
| Case Classes (CR.20.60.00)                  | The format of the control for entering a reaction time for cases with a particular severity level has been changed to 000 d 00 h 00 m, and empty digital places are now filled with zeroes. However, the user should still be careful not to enter, for instance, 500 days if the intended timeframe is 5 days. |
| Account Details (GL.40.40.00)               | The number of characters that can be added to the <b>Transaction Description</b> box has been increased to 256.   |
| Trial Balance (GL.30.30.10)                 | Now you can import a trial balance into a reporting ledger whose currency differs from the base one.  |
| Documents (AP.40.20.00)                     | A <b>Customer</b> column has been added to identify the customer account.   |
| Dashboards                                  | Dashboard usability does not depend on the zoom level set for the web browser.  |

## Performance Improvements

The system performance has been significantly improved in the following areas:

| Area/Form                            | Change  |
|--------------------------------------|---|
| Generic Inquiry (SM.20.80.00)        | The server time for copying a generic inquiry has been reduced by 80%.  |
| Dashboards                           | Performance has been improved during the loading of widgets on dashboards, especially for instances with large databases. The number of SQL requests has been reduced by more than 25%, and the CPU time has been halved (measured on large sample data sets). If an error occurs during the loading of a widget, the error message is displayed within the widget area and doesn't cause an error on the entire dashboard.   |
| Customisation Projects (SM.20.45.05) | Performance has been improved during publishing customisations that include multiple database tables. The database script publication process is now 10 times faster. The progress log is now displayed during the execution of database scripts, which prevents the request from timing out. The following optimisations have been made: <ul style="list-style-type: none"><li>• The system now avoids execution of the same script twice on the same database unless it is explicitly demanded.</li><li>• The site map and table schema update has been optimised.</li><li>• Multi-company publication of scripts has been optimised.</li></ul> |



Bank Deposits (CA.30.50.00)

The **Add Payment to Deposit** pop-up window now opens approximately ten times faster than it did previously, including instances with a lot of records in the database.

Journal Vouchers (GL.30.40.00)

The performance of importing records on this form has been improved significantly, including cases when the **Reuse reference numbers in Journal Vouchers** check box was selected on General Ledger Preferences (GL.10.20.00) form and a user imports a large number of records. Records are now imported approximately 20 times faster than they were previously.

# Resolved Issues

The following table details the issues that are addressed by this release.

| Problem ID                          | Description  |
|-------------------------------------|--|
| <b>Organisation</b>                 |  |
| <b>126135836289</b><br>125958575141 | An error message appeared after deleting a Branch on the Branches form (CS.10.20.00) and trying to navigate away from the form. This has been resolved.  |
| <b>119901818398</b><br>119691843811 | When a company was set up with multiple branches, the option to filter the GST adjustments calculation sheet report (MB.TX.60.01) by branch wasn't available. This has been resolved.  |
| <b>128258379376</b><br>128205113021 | In some cases, an Opportunity could have the wrong Taxable Amount on the Tax Details tab of the Opportunities form (CR.30.40.PL). This has been resolved.  |
| -                                   | There was no way to skip a period of time for employees when entering new Time Cards; for example, seasonal employees had to manually create Time Cards for several months. Another example is re-hired employees.<br><br>Fix Description:<br>A new <b>Generate Time Cards</b> button has been added to the Employee History tab of the Employee form (EP.20.30.00). User have to specify the date up until which Time Cards will be generated.  |
| -                                   | After a workgroup name had been updated in the company tree, the workgroup name was not updated in assignment and approval maps. This has been resolved.   |
| -                                   | The Advanced OnTheGo mobile application did not allow users to enter fractured time in time cards and activities. This has been resolved.  |
| -                                   | An attribute could be deleted even if it was in use. This has been resolved.   |
| -                                   | Some forms, such as Checks and Payments (AP.30.20.00) and Customer Payment Methods (AR.30.30.10), were available for selection through the entity selector on the Assignment and Approval Maps form (EP.20.50.00), even though these forms were unrelated to any assignment or approval process. This has been resolved.   |
| -                                   | If a unit price had been manually entered for a product on the Products tab of the Opportunities form (CR.30.40.00), this price was reset if a user changed the product quantity.<br><br>This has been resolved; now the system does not reset a manually entered unit price when the product quantity is changed. However, a unit price is reset and updated in accordance with the volume pricing if the product's unit of measure is changed. |
| -                                   | Clicking the edit button next to the <b>Business Account</b> field on the Opportunities form (CR.30.40.00) redirected the user to the Customers (AR.30.30.00) or Suppliers (AP.30.30.00) form instead of the Business Accounts form (CR.30.30.00). This has been resolved.   |
| -                                   | For a business account with the Prospect type, a location of an incorrect type (for instance, a customer location) was set as the default location, which resulted in  |

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|                                     | incorrect redirection when lookup buttons were used; also, the prospect's location could not be updated further. This has been resolved.   |
| -                                   | Any activity associated with a purchase order, if it was created on the Purchase Orders form (PO.30.10.00), had an incorrect value in the <b>Related Entity Description</b> field. This has been resolved; the related entity description for purchase order-related activities now consists of the purchase order type and the order number.  |
| -                                   | If a user created a business account through the UI, the system did not create a record in the Note table.<br>This has been resolved; a note reference is now created only after an activity has been associated with the entity. The functionality of import by scenario supports this behaviour.   |
| -                                   | A user could not add a new comment to a case by using the Self-Service Portal because the text field for specifying the comment details was too small. This has been resolved.   |
| -                                   | When attempting to add Activities to a completed project, the user received the error "Project cannot be found in the system." The button is now disabled.   |
| <b>Finance</b>                      |  |
| <b>125982150092</b><br>125874325561 | When using the <b>Add PO</b> button on the Bills and Adjustments form (AP.30.10.00) to add a Purchase Order to an AP bill, the system would time out trying to add large Purchase Orders. This has been resolved.  |
| <b>128436214750</b><br>128321016381 | After voiding reconciliation statements on the Reconciliation Statement form (CA.30.20.00), the form was not defaulting to creating a new one. This has been resolved.   |
| <b>127045930765</b><br>127039584324 | When attempting to create AR/AP payment transactions from imported Bank transactions on the Process Bank Transactions form (CA.30.60.00) the error message 'An error occurred while processing the field Balance : Object reference not set to an instance of an object.' appeared. This has been resolved.  |
| <b>122377260066</b><br>122322489721 | When attempting to print the Customer History or Customer Detail reports, a "Lost Connection to MySQL server" error message appeared. This has been resolved.  |
| -                                   | For a debit adjustment opened on the Bills and Adjustments form (AP.30.10.00), applications were not listed on the Applications tab. This has been resolved.   |
| -                                   | Exporting the Customer Statement report (AR.64.15.00) to Excel created a file whose data cannot be used. This has been resolved; the columns of the Excel file generated by the exporting process from the Customer Statement report are now adjusted.   |
| -                                   | Files and notes attached to the detail lines on the Journal Vouchers form (GL.30.40.00) were not transferred to generated documents.<br>This has been resolved; the files and notes attached to detail lines, including split lines, on the Journal Vouchers form are now transferred to the generated documents of all types.   |
| -                                   | On the Convert Purchases to Assets form (FA.50.45.00), the Object reference not set to an instance of an object error was shown if the depreciation book assigned to the selected fixed asset class had no financial periods generated for the default transaction date ( <b>Tran. Date</b> ).<br>This has been resolved; the error message has been improved. It describes the nature of the problem and gives directions for resolving it. |

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| -  | Four decimal places were shown in the <b>Amount</b> and <b>Balance</b> columns in the list of documents to apply on the Process Bank Transactions form (CA.30.60.00). This has been resolved.   |
| -  | On the Reporting Settings form (TX.20.51.00), <b>Detail by Tax Zones</b> could not be selected for a report line after a previous failed attempt to save the line with <b>Tax Box Number</b> and the <b>Detail by Tax Zones</b> check box selected. This has been resolved. |
| -  | Changing the value in the <b>Setup Item</b> field for a contract item on the Contract Items form (CT.20.10.00) could cause inconsistencies in existing contracts.   |
| -  | Documents with the "Scheduled" status were displayed as having the "Balanced" status on the AR Edit report (AR.61.10.00).   |
| -  | The Tax Details report (TX.62.05.00) included tax transactions that were unreleased, voided, or suspended. This has been resolved.  |
| <b>Distribution</b>  |   |
| <b>129932634431</b><br><b>129932634339</b><br>129658847377<br><b>129403492062</b><br>130276004531<br>129558692791<br>129294794311<br><b>129627913795</b><br>129625749396 | It was not possible to complete a Reconciliation Statement report, due to an incorrect Disbursement Balance. This has been resolved.  |
| <b>129096824492</b><br>128842736277<br>128764710621  | When converting a Sales Order to type "QT" into a Sales Order, the tax information was not transferred to the new order. This has been resolved.  |
| <b>126073639021</b><br>126003763951  | Sales Order type Cash Sales created invoices without the <b>Batch Deposit</b> checkbox ticked, which meant that these payments are not available for inclusion in Bank Deposits. This has been resolved.  |
| <b>126234615786</b><br>126147233271  | When MYOB Advanced was configured to automatically post IN transactions on release, some unreleased transactions were not posted, with the error "Cost to quantity imbalance". This has been resolved.  |
| <b>118383923320</b><br>118382743257  | After creating an approval map for Sales Orders, orders that failed a credit check were incorrectly set to Approved status. This has been resolved.   |
| <b>128645066642</b><br>128217476201  | Kits were excluded from the Sales Order Details by Inventory Item report (SO.61.15.00), which meant it produced different results from the other Sales Order reports. This has been resolved.   |
| <b>128326110407</b><br>128159332971  | "RR" type Sales Orders did not use the correct COGS account. This has been resolved.  |
| <b>130103439856</b><br>130042468628  | In specific circumstances, if a payment and shipment were created from the Sales Orders form (SO.30.10.00), the system displayed the error: "Error #90: Another process has updated 'SOOrder' record. Your changes will be lost." This has been resolved.                   |
| <b>128491755624</b><br>128490618951  | The error "Inserting 'Shipment Line Split' record raised one or more error. Please review. Error: 'Lot/Serial Nbr' may not be empty" occurred when creating a shipment on the Sales Orders form (SO.30.10.00). This has been resolved.                                      |

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| 128508413549<br>128383461962                 | The Purchase Receipts form (PO.30.20.00) now allows users to select a location when Purchase Receipting non-stock items (MI)—see “Enhanced Project Stock Management” on page 9.  |
| 121766219088<br>121273411882                 | After entering a Sales Order that had stock quantities greater than one with no Unit Price, but an Ext. Price, partially shipping the order would generate an invoice with no value on it. This has been resolved.   |
| 125948270056<br>123094359924                 | When creating a return document from an invoice, the returned quantity would be incorrect. This has been resolved.   |
| 129420340140<br>129406484051                 | An error occurred when attempting to add Premium Freight on some Sales Orders. This has been resolved.   |
| -  | The minimum markup verification was performed incorrectly for the sales orders in a foreign currency. This has been resolved.  |
| -  | If no sales order was selected for a shipment in the Add Sales Order dialog box opened from the Shipments form (SO.30.20.00) and the user clicked <b>Add &amp; Close</b> to close the dialog box, no order lines were added to the shipment but the shipment was linked to the order anyway, and the order status changed to Shipping, which resulted in errors. This has been resolved. |
| -  | On the Invoices form (SO.30.30.00), the <b>Add Order</b> button worked incorrectly: It disappeared in the Add Order dialog box after a user had deleted a line from the invoice. This has been resolved.   |
| -  | If the unit price was not specified on the sales order line, the system deduced the price from the <b>Ext Price</b> and <b>Qty</b> to calculate the transaction amount for the invoice when a partial shipment was involved. This has been resolved.   |
| -  | The “SA” Sales order type was visible (but unable to be selected), when this feature had been turned off. This has been resolved; the “SA” is now completely hidden in this scenario.  |
| -  | Landed cost distribution erroneously ignored the specified Lot Number for serial tracked items. This has been resolved.  |
| -  | Deleting shipment lines and re-entering them in a single transaction could result in shipment counters corruption. This has been resolved.   |
| -  | The Inventory Balance report was not showing right “Available” amount when location setup is set to not include available qty. This has been resolved.   |
| -  | No warning was given to the user if they deleted a Purchase Order line that was linked to a Sales Order line. This has been resolved.  |
| <b>Configuration</b>                         |  |
| 119408299449<br>119407671186                 | When setting the conditions of an automation schedule on the Automation Schedules form (SM.20.50.20), the list of available conditions changed from one session to another. This has been resolved.  |
| 125470868210<br>125654632261<br>125379507468 | When a user role was set up to deny access to cost information for inventory items using the Access Rights by Role form (SM.20.10.25), last cost information was still displayed on the Stock Items form (IN.20.25.00). This has been resolved; a new <b>Item Cost Statistics</b> field is available for inventory items on the Access Rights by Role form.                              |

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|   | Revoking access to this field will prevent all cost information from appear to users of the selected role.   |
| <b>129886891493</b><br>129658847371<br>129589402701 | On the Generic Inquiry form (SM.20.80.00), after importing a new XML file to change an inquiry's parameters, the inquiry wasn't refreshed until the user logged out and in again. This has been resolved.  |
| -   | The View Only access rights granted to a user for a top node (that is, for a particular suite) by using the Access Rights by Role form (SM.20.10.25) did not propagate to the child nodes. This has been resolved.   |
| <b>System and Platform</b>                          |  |
| <b>125711559601</b><br>125623118861                 | This release resolves issues where users accessing the system via the Advanced API could be logged out with the message "You have been logged out due to exceeding the number of users".   |
| <b>119152666607</b><br>119147608914                 | Error messages #112 and #120 appeared when trying to send emails from Advanced Business if the <b>Custom Week Configuration</b> setting was enabled on the Time & Expenses Preferences form (EP.10.10.00). This has been resolved.                             |
| <b>126107146092</b><br>125843015321                 | Mass emails could not be sent from a campaign set up on the Marketing Campaigns form (CR.20.20.00). This has been resolved.  |
| <b>115128320332</b><br>115113867025                 | When attempting to record a timestamp, after entering a time into the Days field and tabbing away from it, the value was populated into the Minutes field. This has been resolved.   |
| <b>128326294939</b><br>128326294936                 | Concatenation worked in generic inquiries on a local installation, but it was not possible to use concatenation in a generic inquiry on cloud-based sites. This has been resolved.   |
| <b>114761972927</b><br>114760877616                 | When processing a large number of transactions, the interface could appear to hang; the progress icon would spin but the time taken did not increment. This has been resolved.   |
| <b>122126697652</b><br>122120914075                 | Where parent/child relationships have been set up between customers, the Customer Portal showed child statements and invoices to contacts from the parent company, but these were not distinguished as belonging to the child company. This has been resolved. |
| <b>129891837202</b><br>129711624091                 | After opening a second tab in a web browser, users could be unable to login, receiving an error message instead. This has been resolved.   |
| <b>124581223102</b><br>124429828644                 | Error messages could appear when clicking the <b>Action &gt; Email Sales Order/Quote</b> option on the Sales Orders form (SO.30.10.00). This has been resolved.  |
| <b>128244441039</b><br>128217414791                 | Certain customisations failed with the message "Specified Cast is not Valid". This has been resolved.  |
| <b>124369528190</b><br>123700776851<br>122320221226 | Automated scheduling of Sales Order exports and imports failed with the error message "Error#13 - scheduled task did not complete due to error." This has been resolved.   |
| <b>122576062959</b><br>120508523731                 | Hyperlinks in PDF reports created in the Report Designer did not work. This has been resolved.   |
| <b>128878291707</b><br>128751046701                 | Automated scheduling of invoice creation failed with the error message "Object reference not set to an instance of an Object. This has been resolved.  |

- A user couldn't reset the password during a temporary lockout due to the user reaching the specified limit of failed login attempts. This has been resolved.
- It was impossible to manage (update or delete) filters on the Filters form (CS.20.90.10) that had been created on selector lookups—for example, on the **Vendor ID** selector of the Suppliers form (AP.30.30.00). This has been resolved.
- On the Data Providers form (SM.20.60.15), the **Save** button was not available after a source object or a source field had been deleted on the Schema tab. This has been resolved.
- If the web service definition (screen-based WSDL) had been generated in any company other than the first company created on an application instance, the web reference could not be added to a Visual Studio project. This has been resolved.
- Under some conditions, the wrong value could be displayed for a custom field after the user had signed out and signed back in to the system. This has been resolved.
- A universal search could not find a form if a list was set as the entry point for the form. This has been resolved.
- Customising data views of the PXProcessing and PXFilteredProcessing types resulted in a NullReferenceException exception being thrown when a user clicked the **Process** or **Process All** button on a processing form. This has been resolved.
- Wrong emails could be saved through a web service API call because email validation worked differently in the user interface and the web service API. This has been resolved.
- The system did not throw an error when a user attempted to save a generic inquiry that was using columns of a table that had been deleted from the Tables tab. This has been resolved.
- On the Expense Receipt mobile screen, the default X project code was not populated in the Project box. This has been resolved.
- The system did not properly update an AR invoice line via a web service API call. This has been resolved.
- The iOS version of the Advanced OnTheGo mobile application could crash on an attempt to display an error message. This has been resolved.
- Panels from report forms were not exported to Excel in manual mode. This has been resolved.
- On the Process Invoices and Memos form (SO.50.50.00), the invoice statuses were being changed back and forth during the release operation. This has been resolved.
- Users could not delete customer records from the Customers form (AR.30.30.00) by using the mass deletion operation in a generic inquiry for customers. This has been resolved.
- In the Layout Editor of the customisation frameset, the error message "The 'DataMember' property cannot be set declaratively" appeared once the DataMember property was specified for a PXGrid control. This has been resolved.
- The **Write-Off Limit** field could not be updated on the Customers form (AR.30.30.00) by using the mass update operation in a generic inquiry for customers.

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| -                    | Notes and attachments could not be saved once they were added through the following processing forms: <ul style="list-style-type: none"> <li>• Release AR Documents (AR.50.10.00)</li> <li>• Print Invoices and Memos (AR.50.80.00)</li> <li>• Print/Email Purchase Orders (PO.50.30.00)</li> <li>• Process Orders (SO.50.10.00)</li> <li>• Process Shipments (SO.50.30.00)</li> <li>• Process Invoices and Memos (SO.50.50.00)</li> </ul> This has been resolved. |
| -                    | It was not possible to copy a new automation definition by using the <b>Copy Details</b> button on the Automation Definitions form (SM.20.50.10). This has been resolved.  |
| -                    | The FULL JOIN condition did not work in reports and generic inquires. This has been resolved.  |
| -                    | Publishing a project with an import scenario for the second time might cause the following error message to be displayed: "Violation of PRIMARY KEY constraint 'SYProviderField_PK'." This has been resolved.  |
| -                    | The UI State of a dialog box was kept after it was closed. This has been resolved.   |
| -                    | When browsing the wiki in the Firefox, the navigation menu could disappear. This has been resolved.  |
| -                    | After adding a new Supplier Class, the default mailing settings would be added twice. This has been resolved.  |
| <b>Documentation</b> |  |
| -                    | The description of the GetDescription() function used in ARM reports was not complete. This has been resolved.   |
| -                    | The description of the <b>Create New</b> button on the Customer Payment Methods form (AR.30.30.10) was absent. This has been resolved.   |
| -                    | The description of the Monitoring and Automation feature incorrectly stated its availability for MYOB Advanced editions. This has been resolved; the description has been changed to notify customers that the feature is not available in the standard edition of MYOB Advanced, as was stated previously.  |



# Known Issues

The following Known Issues have been identified in this release.

## Partner users visible on some forms

User accounts with the licence type MYOB\_Partner and the Admin account used exclusively by MYOB are hidden from all other users; they do not appear on user selection lists. However, these user accounts will appear in selection lists on the following forms:

- Event > Attendees (CR.30.60.30)
- Role List (SM.65.10.00)