MYOB Advanced

Release Notes

2017.1

Contents

Introduction

Welcome to the 2017.1 release of MYOB Advanced.

What's New in this Release?

MYOB Advanced 2017.1 is a major release that adds new features and improvements to the MYOB Advanced system. These include improvements to activity processing, the addition of approvals for Accounts Payable documents, dashboard enhancements and updates to Generic Inquiries. This release also addresses a wide range of issues across the MYOB Advanced system. The following sections provide details of the changes included in this release.

Installing this Release

The 2017.1 release 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.

Upgrade Notes

Multiple changes have been made in MYOB Advanced 2017.1 that may affect customisations and integrations. The following sections contain details of these changes.

If your MYOB Advanced instance was integrated with software provided by an independent software vendor (ISV) partners, we recommend that you work with your partner prior to your scheduled upgrade date to ensure the compatibility of their products with MYOB Advanced 2017.1—this can be done using the provided upgrade sandbox environment.

Notice for Customised Sites

MYOB Advanced 2017.1 includes multiple changes that may affect reports, customisations and integrations that were built in the prior version.

To prevent breaking changes in your customisations:

1. Analyse your customisations.
2. Carefully read the list of breaking changes in the "Breaking Changes" section on page 31,.
3. Replace changed objects with their alternatives.
4. If the objects used in your customisations were removed without a replacement, consider creating new customisations.

After an upgrade to MYOB Advanced 2017.1, to detect the changes that break an existing customisation, you can check the compatibility of the code included in all published customisation projects with the original code. For details, see "Publishing a Customisation" in the MYOB Advanced Customisation Guide (the "Checking the Compatibility of the Customisation Code with the Original Code" section).

The complete list of the changes with the suggested alternatives is provided in the *MYOB Advanced 2017.1 Technical Release Notes* document.

Upgrade Procedure: Screen-Based API Wrapper

Because of the connection of the screen-based SOAP API with MYOB Advanced forms, the applications that are developed based on this API are sensitive to UI changes in the system. For interaction with MYOB Advanced, the client application uses the schema of an MYOB Advanced form, which defines the correspondence between the API elements and the internal data fields of MYOB Advanced. If something has been changed in the UI of MYOB Advanced, the schema is changed as well; however, the application continues to use the schema for which it was compiled and fails. Therefore, any changes made to the UI after the application is created require you to update and recompile the application.

As an alternate approach, you can change your client application so that it uses the screen-based API wrapper introduced in MYOB Advanced 2016.1. This approach prevents UI changes from causing application failures after an upgrade to a newer version of

MYOB Advanced and omits the step of updating and recompiling the application for each UI change.

The screen-based API wrapper is a special wrapper that was designed to prevent failure of your application that can happen because of the UI changes in the system. The screen-based API wrapper saves the schema of an MYOB Advanced form that was initially used by the application to a local XML file and restores this schema to the server each time the application is running, which prevents breaking of the application because of changes in the user interface of MYOB Advanced. For more information on the screen-based API wrapper, see "Screen-Based API Wrapper" in the MYOB Advanced User Guide.

Upgrade of a Client Application or Customisation for MYOB Advanced 2017.1

To prevent application failures with the update to MYOB Advanced 2017.1, you can recompile your application so that it uses the screen-based API wrapper as follows:

1. Create a test copy of your production instance of MYOB Advanced 2017.1.
2. Make the following changes to the project of your client application:
    a. Add a reference to PX.Soap.dll to your project. This file is installed automatically with MYOB Advanced 2017.1 in the ScreenBasedAPIWrapper folder of your MYOB Advanced 2017.1 installation folder.
    b. Use the Helper.GetSchema() method from the PX.Soap library in the code of your application instead of the corresponding Screen.GetSchema() method to obtain the schema of each form.
3. Compile the application and test it with the test copy of your MYOB Advanced instance.
4. Update the test copy of your MYOB Advanced instance to MYOB Advanced 2017.1.
5. Test the client application with the updated test copy of your MYOB Advanced instance.
6. Update the production instance of MYOB Advanced to MYOB Advanced 2017.1.

For more information on the use of the screen-based API wrapper, see "To Use the Screen-Based API Wrapper" in the MYOB Advanced User Guide.

New Features

Improved Processing of Activities

MYOB Advanced 2017.1 includes improvements to system performance; the processing of activities during various update operations has been streamlined and sped up.

In previous versions, the EPActivity table stored all data related to activity records, which led to multiple performance issues.

Changes to the Database

The EPActivity table has been split into the following four tables:

- CRActivity: This table stores all tasks, events, and activity records, such as information about phone calls.
- SMEmail: This table stores inbound and outbound emails and the email details required for the email processing and synchronisation with Exchange.
- PMTimeActivity: This table stores the activity details required for reporting the time spent on activities. Time cards now use the data from only this table.
- CRReminder: This table stores reminders for activities.

Any type of activity (event, task, email, or activity) created in MYOB Advanced 2017.1 is stored as a CRActivity record or a combination of two or three different types of records, which can be any of the following:

- CRActivity and PMTimeActivity
- CRActivity and SMEmail
- CRActivity, SMEmail, and PMTimeActivity

At the same time, PMTimeActivity and SMEmail records can represent self-sufficient entities: An SMEmail record can be an abridged version of an email (system email), and a PMTimeActivity record can be created on the Employee Time Card (EP.30.50.00) or Employee Time Activities (EP.30.70.00) form, with no related CRActivity record created.

The EPActivity table has been renamed to Obsolete_EPActivity to preserve any custom data.

Custom Data Transfer

The changes to the database may affect integrations, customisations, generic inquiries, and custom reports. An upgrade of the MYOB Advanced Self-Service Portal to version 2017.1 may cause it to malfunction. Because integrations are not compatible across versions, any integration, if it uses the EPActivity data access class and if it has been implemented in any earlier version, must be reconsidered and adjusted for use with MYOB Advanced 2017.1. Also, you may need to review integrations and customisations that involve time cards and time activities.

During an upgrade to MYOB Advanced 2017.1, the EPActivity table in the database is renamed to Obsolete_EPActivity to preserve all custom fields and database indexes used in the older version. After the update, you can run a script to transfer your custom data. Below is an example of such a script for the most probable case when each custom field is an add-up to the new PMTimeActivity table:

```
UPDATE PMTimeActivity
SET UsrField1 = E.UsrField1,
UsrField2 = E.UsrField2
FROM PMTimeActivity T
ON E.CompanyID = T.CompanyID AND E.NoteID = T.RefNoteID
```

After the script is run, the Obsolete_EPActivity table can be deleted to save database space.

Changes to User Interface and Workflows

No user interface changes were introduced by these improvements.

> **Note:** If a detail line is added on the Employee Time Card form (EP.30.50.00), the system records only the time reporting data and does not create an activity. This is why a user cannot open such a record by using the Activities form (EP.40.43.00).

Contact Information for an Opportunity

In MYOB Advanced, an opportunity represents a potential sale to a new or existing customer. Previously, to view or modify contact information for an opportunity, you had to open the opportunity-related contact or business account on the Contacts (CR.30.20.00) or Business Accounts (CR.30.30.00) forms. Now you can access contact information by using the new Contact Info tab of the Opportunities form (CR.30.40.00):

If you have a contact who is not registered in the system, but who is interested in your quote and has displayed an intention to buy, the contact can be regarded as a qualified opportunity. You can immediately create an opportunity for this contact on the Opportunities form and specify basic contact information on the fly by using the Contact Info tab of the form, instead of first creating a new business account or contact on the Business Accounts or Contacts forms and then associating it with the opportunity.

For details on creating opportunities for contacts that are not registered, see "Opportunity-Related Contact Information" in the MYOB Advanced User Guide.

Approvals of Accounts Payable Documents

MYOB Advanced 2107.1 provides functionality that you can use to set up the process of approving Accounts Payable documents by the designated employees before these documents are processed in the accounting system and paid. These approvals can be used, for example, to prevent double-payment of bills or payments for inaccurate or fraudulent bills.

Approvals can be performed by one person only or by multiple persons. When multiple persons are designated to approve a document, they can approve it either in parallel (the documents are reviewed by multiple approvers at the same time), or in multiple successive stages (that is, once one employee has approved the document, it becomes available for approval by the next employee). You can set up both of these processes in MYOB Advanced.

Setting Up the Approval of Accounts Payable Documents

The approval workflow functionality is set up on the Accounts Payable Preferences form (AP.10.10.00). Before you set up the approval process on this form, you must first configure the approval map or maps on the Assignment and Approval Maps form (EP.20.50.00). A map defines the employee or employees designated for approving AP documents, and the conditions that AP documents must match to be assigned for approval. Once the maps are created, specify the required ones on the Approval tab of the Accounts Payable Preferences form. You can, if needed, specify the template of the notification email to be used by the system for notifying approvers about the documents pending their approval.

Processing AP Documents with Approvals Set Up

With approvals set up, when an AP document is created, saved, and taken off hold on the Bills and Adjustments form (AP.30.10.00), it gets the Pending Approval status. The responsible approver receives an email notification (if an email notification template is specified for this approval process) about the document pending his or her approval, and can review the documents pending approval on the Approvals form (EP.50.30.10). On this form, he or she can select one record or multiple records in the list and approve the documents, or approve or reject each particular document directly on the Bills and Adjustments form.

You can view the detailed approval information for each Accounts Payable document on the Approval Details tab of the Bills and Adjustments form. On this tab, you can view to whom the document was assigned, who approved the bill, and when approval was granted.

You can make changes in the approved document once you put it on hold. After you take the document off hold, the approval process starts again.

For details on setting up the approvals for Accounts Payable documents, see "Approvals of Accounts Payable Documents" in the MYOB Advanced User Guide.

Approvals of Expense Receipts

MYOB Advanced now provides the ability to set up the process of approving expense receipts submitted by employees of your company. For more information on the approval of expense receipts, see "Expense Receipt Approval" in the MYOB Advanced User Guide.

To configure the approval process, enable the "Approval Workflow" feature on the Enable/Disable Features form (CS.10.00.00) and specify an approval map in the **Expense Receipt Approval Map** box on the General Settings tab of the Time and Expenses Preferences form (EP.10.10.00):

Based on the map, authorised approvers are assigned to submitted expense receipts and optionally notified by email about the receipts pending approval. You can approve or reject expense receipts by using the **Approve** or **Reject** actions on the Expense Receipt form (EP.30.10.20):

Receipts can also be approved on the Approvals form (EP.50.30.10). If you have access to this form, you can view receipts in accordance with the visibility rules applied to all documents listed on this form. (That is, you can view the receipts assigned to you, to the members of your workgroup, and to the members of the workgroups at lower levels in the company tree than your workgroup.)

Once approved, expense receipts can be claimed if approval is required for the receipts based on the conditions specified in the approval map. Rejected receipts can be put on hold for a user to adjust and re-submit them.

The following new statuses of expense receipts have been introduced in the scope of this feature:

- **On Hold**: The receipt is new and has not been submitted for approval yet.

- **Open**: The receipt is ready to be claimed after it has been approved (if approval is required for the receipt) or after it has been submitted for further processing (if approval is not required).

- **Pending Approval**: The receipt is pending approval.

- **Rejected**: The receipt has been rejected.

Accounts Receivable Parent-Child Functionality Enhancements

If your company deals with companies that have franchises or multiple branches, you can configure parent-child relationships in MYOB Advanced between the customer accounts that represent these companies.

In MYOB Advanced 2017.1, the parent-child customer relationship functionality has been enhanced—the ability to manage the credit control on the parent account level has been implemented.

For details, see "Credit Policy Application" in the MYOB Advanced User Guide.

Credit Verification Rules

Now, the credit verification rules defined for the parent account can be shared with the child accounts. You can set up this capability on the Customers form (AR.30.30.00) by ticking the **Share Credit Policy** check box in the Parent Info section of the Billing Settings tab for child accounts. This check box becomes available when you select the **Consolidate Balance** check box in the same section. With these settings specified, the settings specified for the parent account in the Credit Verification Rules section on the General Info tab will be applied to the documents of all related child accounts.

Consolidated Dunning Letters

If your company policy requires that dunning letters be sent (and the Dunning Letter Management feature is enabled in your system), the system consolidates the overdue documents of a parent account and its child accounts that have the Share Credit Policy check box selected in the Parent Info section of the Billing Settings tab on the Customers form, and sends the dunning letters to the parent account contact. If you change the credit policy configuration for the parent account, the system will reflect these changed settings in its child accounts that share the parent account's credit policy.

AR Reports That Can Include Consolidated Data

In MYOB Advanced 2017.1, you can generate reports that group child accounts (or their documents) under the parent account and show individual account balances along with the consolidated balance of the group. Child accounts that have the **Consolidate Balance** check box selected are grouped under their parent account, and their balances are consolidated with the parent balance. The following MYOB Advanced reports have a check box (either **Group by Parent Account** or **Consolidate Data by Parent Account**) that you can select to generate reports regarding parent-child relations:

- AR Balance by GL Account (AR.63.20.00)
- AR Balance by Customer (AR.63.25.00)
- AR Balance by Customer MC (AR.63.30.00)
- AR Aged Past Due (AR.63.10.00)
- AR Aged Past Due MC (AR.63.11.00)
- AR Aged Outstanding (AR.63.15.00)
- AR Aged Outstanding MC (AR.63.16.00)
- AR Aged Period Sensitive (AR.63.05.00)

> **Note:** If any of these reports have been customised in your system, you need to customise these updated reports again because the new parameter has been added to the reports.

Dashboards and KPI Enhancements

The management and configuration of dashboards have been significantly enhanced in MYOB Advanced 2017.1. It is now more convenient to add new dashboards, manage existing dashboards, and configure widgets on dashboards.

> **Note:** Dashboards that were created in previous versions of MYOB Advanced will be converted into the new format during upgrade. We recommend that you check all dashboards after upgrading and adjust them according to your needs.

For details on managing dashboards, see "Managing Dashboard Pages" in the MYOB Advanced User Guide. For information about the configuration of widgets, see "Dashboards".

Implemented Enhancements

The following enhancements have been introduced in MYOB Advanced 2017.1:

- **A single form for managing all dashboards in the system**: The new Dashboards form (SM.20.86.00) has been added, where you can add and remove dashboards and modify the properties of dashboards.
- **Dashboard management by a dedicated user role**: A user with a role that has full access to the Dashboards form can add and delete dashboards, set up access rights to dashboards for user roles, change the locations of dashboards in the site map, allow users to modify dashboards, and populate dashboards with widgets. The pre-defined DashboardDesigner role is no longer needed for managing dashboards.
- **Ability to locate dashboards in any position of the site map**: You can locate dashboards in the position of the MYOB Advanced site map where they are most convenient for the users who can use the dashboards in their daily work.

- **Control of access rights to dashboards**: You can control which user roles can view each dashboard. For users who can view the dashboard, you can also control whether the users can personalise the dashboard (that is, configure and modify the widgets of the dashboard).
- **Personalisation of dashboards without changing the original dashboard**: A copy of a dashboard is created automatically when a user begins to modify any widget on the dashboard. Users work with their copy of the dashboard and do not change the original dashboard.
- **Dashboard owner**: Each dashboard now has an owner. You can assign one user to be the owner of all dashboards (for example, an administrator) or designate a dedicated user as the owner of each dashboard. The dashboard owner can configure the original dashboard. The predefined DashboardDesigner role is no longer needed for dashboard configuration.
- **View and design modes of a dashboard**: Two modes have been implemented for dashboards—view mode and design mode. In view mode, users can only view information on widgets; they cannot configure widgets. In design mode, users can add, delete, and modify widgets. Switching between these modes helps users to avoid accidental modifying a dashboard.
- **Support of new widgets**: The list of supported widgets has been extended with the embedded page, the scorecard KPI, and the trend card KPI widgets. By using new widgets, you can extend the types of information to be placed on a dashboard.
- **Easier chart widget configuration**: The dialog box where you specify properties of a chart widget has been redesigned to unify settings and make it easier to configure the widget.
- **Predefined dashboard layouts**: You can select one of the predefined layouts of a dashboard to place widgets on, for convenient configuring of dashboards and viewing of information.

Supported Widgets

The following types of widgets can be added to dashboards:

- **Charts**: Graphical representations of data from MYOB Advanced forms. You can use charts of various types, such as bar charts and line charts.
- **Data tables**: Data from an MYOB Advanced form arranged into rows and columns.
- **Wiki pages**: Reference articles, procedures, business plans, and other content that is frequently referenced by users of MYOB Advanced.
- **Embedded pages**: Documents or images that are stored on external resources such as cloud storage and should be displayed on an MYOB Advanced dashboard.
- **Scorecard KPIs**: Parameters that are important for the business processes of your organisation and that should be monitored on a daily basis.
- **Trend card KPIs**: Parameters whose dynamic change is important for the business processes of your organisation.

User Interface Changes

The following changes have been made in the user interface of MYOB Advanced to support the new dashboard functionality:

- The new Dashboards form (SM.20.86.00) has been added to the site map. You can use this form to maintain dashboards and access rights to them.
- A new Add Widgets dialog box has been implemented for adding and configuring widgets on dashboards. The dialog box can be opened from a dashboard page in design mode.
- The Dashboards title bar menu item has been removed from all forms. A dashboard can be designed on the dashboard page only.
- Custom colours for column and bar sectors now can be specified for stacked column and stacked bar widgets on a dashboard.
- The ability to drill down from chart and table dashboard widgets has been implemented. That is, a user can click a chart parameter or a table line, and the corresponding form will be opened with the data filtered by the selected parameter.

Pivot Table Support on Inquiry Forms

A new control has been implemented that provides pivot table functionality for the user and can accept generic inquiries as a data source in MYOB Advanced. A pivot table is a program tool that you can use to reorganise and summarise data in a generic inquiry, to view it from different perspectives. This capability is useful when you have large amounts of data in the generic inquiry and you need to build aggregate reports based on this data.

Among other functions, a pivot table can automatically sort, count, total, or give the average of the data stored in a generic inquiry, displaying the results in a separate table that shows the summarised data. You can configure and change the structure of pivot tables simply by dragging and dropping fields. For details, see "Pivot Tables in MYOB Advanced" in the MYOB Advanced User Guide.

The data for pivot tables is stored separately from the data for generic inquiries in the system database. This makes it possible for users to work with pivot tables even if the generic inquiry on which they are based is unavailable for some reason.

Users may open configured pivot tables as follows:

- Through the site map, if the pivot table was added there during configuration.
- From the generic inquiry form, by using the Pivot Tables menu item on the form title bar, which appears when at least one pivot table is created for the particular generic inquiry.

A new Pivot Tables (SM.20.80.10) form has been added to the site map where you can configure pivot tables for users:

To configure a pivot table, perform the following steps on the Pivot Tables form:

1. Open the form in one of the following ways:
   o From the generic inquiry form that will be used as a data source for the pivot table: On the form title bar, click Customisation > Pivot Tables.
   o From the site map: Navigate to System > Customisation > Manage > Pivot Tables.
2. In the **Screen ID** box, select a generic inquiry from the list of existing generic inquiries. (If you opened the Pivot Tables form from the generic inquiry form, the inquiry is selected automatically.)
3. By dragging the fields to the appropriate panes of the form, you can select the generic inquiry fields that will be used in rows, in columns, and in the data area (the Values pane) of the pivot table; you can also select the fields that should be used for filtering by dragging and dropping them to the Filters pane on the form.
4. Optional: Specify the display properties for the generic inquiry fields that are used in the pivot table, such as a custom caption, sorting type, aggregate functions, and cell width.
5. Optional: In the **Site Map Location** box in the Summary area of the form, specify the position of the created pivot table in the MYOB Advanced site map if you want users of your MYOB Advanced instance to access it in the site map.
6. Optional: Share the pivot table within your MYOB Advanced instance by selecting the **Is Shared** check box if you want other users of MYOB Advanced to use it.
7. Optional: In the Summary area of the form, select a shared filter that will be applied to the pivot table.

Localisation Improvements

MYOB Advanced provides functionality that you can use to localise transactional data in multiple languages.

MYOB Advanced 2017.1 introduces the ability to translate user input to multiple languages, store translations in the database, and to apply locale-specific settings to reports and notifications. For details, see "Managing Locales and Languages" in the MYOB Advanced User Guide.

Multilingual User Input

You can translate user input to multiple languages and store translations in the database. For example, you can enter descriptions of General Ledger accounts in multiple languages and then print a localised version of the trial balance report with the descriptions of the accounts in the language of the locale you are currently signed in with.

The system retrieves the ISO codes of languages from the locales (active and inactive) you have added on the System Locales form (SM.20.05.50) and creates new entities— languages that are associated with a locale or multiple locales. This is the initial list of languages that you will use to define a set of languages to translate user input to.

> **Note:** The system associates multiple locales with a language if the identifiers of these locales contain the same ISO code of a language. For example, the en-US, en-GB, en-AU, and similar locales are all associated with the language whose ISO code is en.

You can define the list of languages to be used in user input translations by clicking the **Set Up Languages** button on the toolbar of the System Locales form. In the Languages dialog box that opens, specify the languages in which you are going to localise values and define the default language. A language can be marked as the default language, an alternative language, or a language that is not used in the localisation of user input. Specifying a default language enables the multi-language support for the text boxes in the system. The default and alternative languages form the list of languages for which you can provide translations.

> **Note:** Once you set up languages in the table on the System Locales form, you can view which locales are associated with languages that are the default, an alternative, or not used in localisation by adding to the table the **Alternative Language** and **Default Language** columns, which are hidden by default.

In the screenshot below, you can see that the English language is marked as the default language, German and French are alternative languages, and Spanish is not involved in localising user input. Note that in this case, each locale is associated with one language. The fr-CA locale is inactive, but you can mark French language as an alternative or the default. Once you activate the locale, the associated language can be used in localising user input.
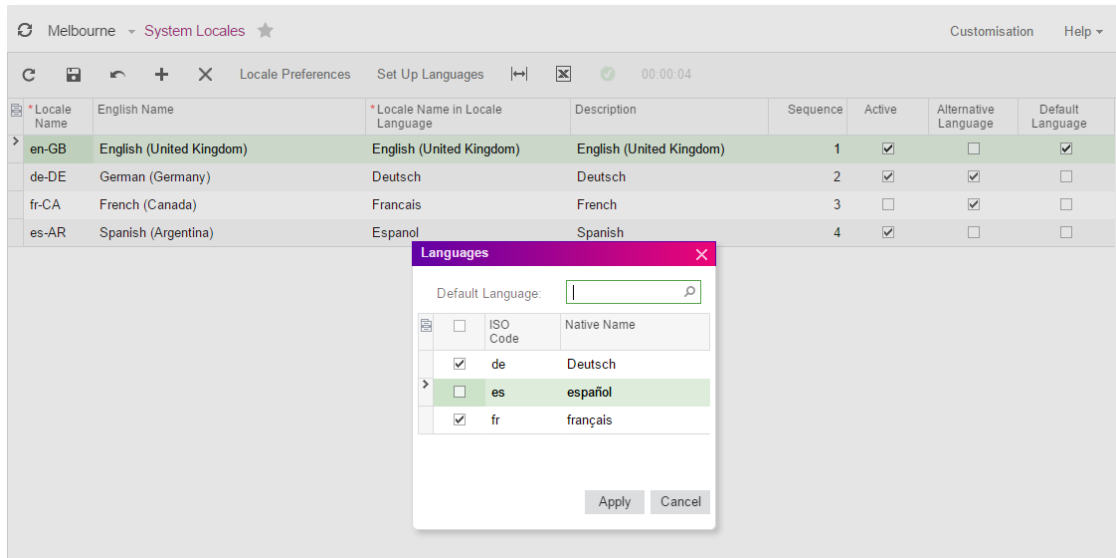
Once you have finished, you can add translations to the boxes with multi-language support, regardless of the locale you are currently signed in with. That is, the link with the ISO language code is displayed next to multiple text boxes in the system. Clicking this link invokes the Translations dialog box, as shown in the following screenshot.
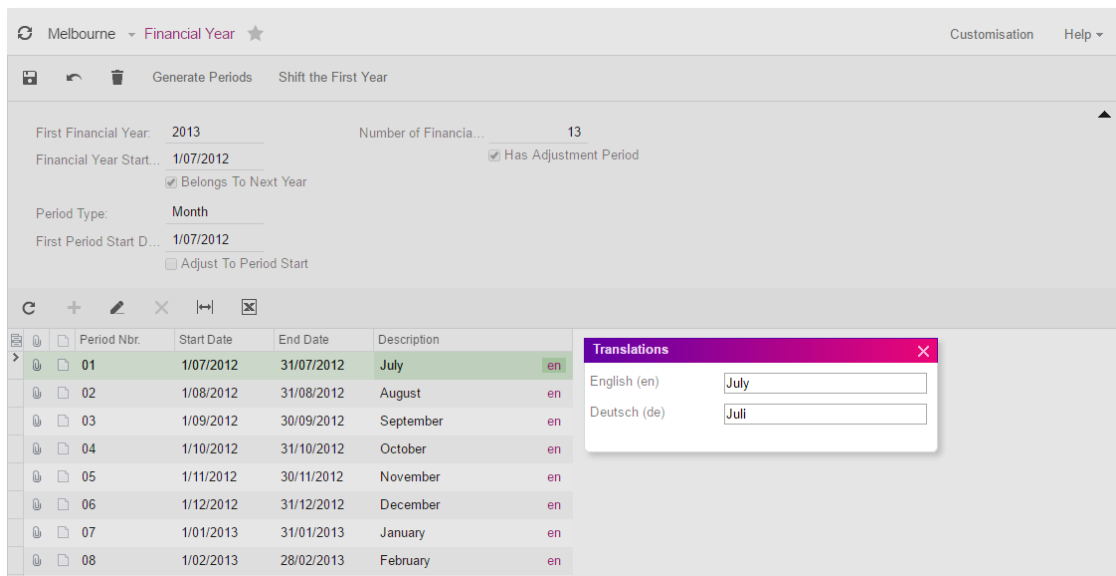
You can also upload translations from a file for those entities (such as account classes, ledgers, and financial periods) that support integration with Excel.

You can also import values to these text boxes and export values from them by using integration scenarios. For details, see "Multi-Language Fields in Import and Export Scenarios" in the MYOB Advanced User Guide. For the list of boxes with multi-language support, see "Boxes that Have Multi-Language Support".

You can expand this list by means of customisation. Also, if the PXDBString attribute for a box from the list was customised in the earlier versions, after upgrade to MYOB

Advanced 2017.1, the box will not have multi-language support. For details, see "How to Provide Multi-Language Support for a Field" in the MYOB Advanced User Guide.

Localised Reports, Documents, and Notifications

A **Locale** box has been added to report forms. If you specify a locale in this box, the system prepares the report in the locale language if the report strings were translated to this language. Also, if you have set up multilingual user input and provided translations for fields that supply data to the report, the system will replace report data with translations in the language that is associated with the selected locale.

For example, suppose that you have translated the strings of the Trial Balance Summary report (GL.63.20.00) for some French locale (for example, fr-CA or fr-FR) and entered translations of the GL account descriptions in French. If you sign in with a locale associated with the English language (for example, en-US or en-UK) and you select a French locale on the report form, the system prints the fully localised report with the strings of the report (headers and footers) and with the GL account descriptions in French.

A **Locale** box has been added to notification templates. If you specify a locale in this box, the system applies the locale-specific settings to the notification template. Also, if you have set up multilingual user input and provided translations for fields that supply data to placeholders in a notification template, the system will replace notification placeholders with translations in the language that is associated with the selected locale.

Also, the Locale box has been added to the following forms:

- Customer Classes (AR.20.10.00)
- Customers (AR.30.30.00)
- Vendor Classes (AP.20.10.00)
- Vendors (AP.30.30.00)

You can associate a locale with a customer or vendor. If you do, when you create a document for the customer or vendor that includes data populated by the system from localised fields, the system will use the translations of these values in the language that is associated with the locale specified for the customer or vendor specified in the document. For example, suppose that you associated a customer with some French locale (for example, fr-CA or fr-FR) and entered translations of inventory item descriptions in French. When you create an invoice on the Invoices and Memos form (AR.30.10.00), select the customer, and add an inventory item, the system populates the **Transaction Descr.** Column with the item description in French. When you release the invoice, the same description in French is posted to the ledger as the GL transaction description.

For the configuration steps and implementation details, see "Usage of User Input Translations" in the MYOB Advanced User Guide.

Changes to the Database and API

The PXDBLocalisableString attribute has been introduced for text fields. You should use the attribute to declare a text field as a multi-language one in the data access class. For details, see "How to Provide Multi-Language Support for a Field" in the MYOB Advanced User Guide.

The following new attributes have been introduced in API with the localisation improvements. For more information on these attributes, see "Working with Multi-Language Fields" in the MYOB Advanced User Guide.

Attribute	Description
PXDBLocalisableString	Indicates that a field can have values in multiple languages. You can use the methods of the corresponding PXDBLocalisableStringAttribute class to obtain the values of multilingual fields in specific languages.
PXLocalisableDefault	Specifies the default value of a multilingual field.

Changes to the User Interface

The following changes to the user interface have been introduced with the localisation improvements.

Area/Form	Element	Change	Description
System Locales (SM.20.05.50)	The **Set Up Languages** button	Added to the form toolbar	Clicking the button invokes the Languages dialog box, which allows you to form the list of languages to be used in localising user input.
	The **Alternative Language** and **Default Language** columns (hidden by default)	Added to the table	The check boxes in the columns show whether a locale is associated with a language that is the default, an alternative, or not used in localisation.
Report forms	The **Locale** box	Added to the Template area	A locale that you select here indicates to the system that the report should be prepared in the language associated with the selected locale. The value in the box overrides a locale specified for the report in the Report Designer (if any). The box is displayed if there are multiple active locales in the system.
Notification Templates (SM.20.40.03)	The **Locale** box	Added to the Summary area	A locale specified here indicates to the system that the region-specific settings of the locale should be applied to a notification and the placeholders in the notification body should be replaced with the data translated to the language associated with the selected locale.
Multiple text boxes in the system	A link with an ISO code of a language	Displayed on the right of boxes, if multilingual user input is set up in the system	If you click the link, the system brings up the Translations dialog box, where you can enter translations of the box value. For details, see "Translations Dialog Box" in the MYOB Advanced User Guide.
Customer Classes (AR.20.10.00) Customers (AR.30.30.00) Vendor Classes (AP.20.10.00) Vendors (AP.30.30.00)	The **Locale** box	Added to the Summary area	A locale specified here defines the language in which vendors or customers prefer to receive documents. The box is displayed if there are multiple active locales in the system.

Improved Navigation from Generic Inquiry Screens

In MYOB Advanced 2017.1, navigation from generic inquiry screens has been significantly improved. In previous versions of MYOB Advanced, if a user clicked the link on a generic inquiry form, the system could navigate to only the data entry form for the selected record. Now you can specify which form, inquiry, or report should be opened by the link.

Specifying the List of Screens to Use for Navigation

On the Navigation tab, which has been added to the Generic Inquiries form (SM.20.80.00), you can specify the list of screens to be used for navigation from the inquiry.

In the Screens pane (lower left), you can specify the list of screens to be used for navigation from the inquiry.

In the Navigation Parameters pane (lower right), for each screen, you can specify navigation parameters. You select a key field of the screen as the Field and select an inquiry parameter to be passed to this field as the Parameter. In the **Window Mode** box, you can select the way to open the screen: in the same browser tab instead of the inquiry (the default mode), in a new browser tab, or in a new pop-up window.

Selecting the Screen to Navigate To

On the Result Grid tab of the Generic Inquiries form, you can specify the form to navigate to for each column of the inquiry form. The following columns have been added to the tab instead of the Suppress Navigation column:

- **Default Navigation**: A check box that indicates (if selected, which is the default value) that the field value can be a link to the default entry form, if any. If the check box is cleared, the field value can be a link to the form selected in the Navigate To box.
- **Navigate To**: A form specified on the Navigation tab that the user can open by clicking the link in the column. If the **Default Navigation** check box and the **Navigate To** box are cleared, the hyperlink is not displayed in the field.

Configuring an Inquiry to Replace an Entry Form

On the Entry Point tab, when you select an entry form as the Entry Screen to replace the selected entry screen with the inquiry, this form is now automatically added to the Navigation tab. With the **Replace Entry Screen with this Inquiry in Menu** check box selected, the entry form always opens in the same browser tab when a user is adding a new record from this inquiry or viewing the details of an existing record from the inquiry.

On the Navigation Parameters section of the Navigation tab, you can modify the inquiry parameters that should be passed to the key fields of the entry form.

User Interface Changes

The user interface changes that have been made to the Generic Inquiry form since previous versions are listed in the following table.

Area/Form	Element	Change	Description
Summary area	The **Screen ID** box	Added	The system automatically generates the screen identifier of the inquiry, when you save the inquiry for the first time.
Results Grid tab	The **Default Navigation** column	Added	Select this check box to make the field a link to the default form, if any.
Results Grid tab	The **Navigate To** column	Added	Specify a screen on the Navigation tab to make the field a link to this screen.
Results Grid tab	The **Suppress Navigation** column	Deleted	To suppress navigation, clear the **Default Navigation** check box and the **Navigate To** box.
Entry Point tab	The **Open Entry Screen as Pop-Up by Default** check box	Deleted	Now the entry screen is always opened in the same browser tab.
Entry Point tab	The Navigation Parameters table	Moved	You can specify navigation parameters on the Navigation tab.
Navigation tab	The entire tab	Added	On this tab, you can specify the list of forms to be used for navigation from the inquiry.

For details on configuring navigation for generic inquiries, see "Generic Inquiry" and "To Configure a Generic Inquiry to Replace an Entry Form" in the MYOB Advanced User Guide.

Partial Receipt of Two-Step Transfers

Sometimes transferred stock items are partially received, and this needs to be reflected in the system. To satisfy these requirements, MYOB Advanced now provides the ability to receive partial quantity of stock items in transfers.

It is now possible to create partial receipts of stock items that have already been shipped from the source warehouse but have not yet received at the destination warehouse. You can create partial transfer receipts for the inventory transfers on the Receipts form (IN.30.10.00), and partial receipts for transfer orders on the Purchase Receipts form (PO.30.20.00). The **Receipt Qty.** column on the Document Details tab of the Purchase Receipts form and the **Quantity** column on the Transaction Details tab of the Receipts form (IN.30.10.00) are now editable, so that you can correct the quantity for the lines for which the items are received partially.

The informational columns **Received Qty.** and **In-Transit Qty.** have been added to the Transaction Details tab of the Transfers form (IN.30.40.00) and to the Document Details tab of the Shipments form (SO.30.20.00) for shipments of the Transfer type. The **Received Qty.** column shows the total quantity specified in the receipts that are linked to the current document line. The **In-Transit Qty.** column shows the quantity of items that are in-transit.

Change of Customer in Sales Orders

To extend the ways you work with sales orders and simplify the creation of sales orders by using template orders, MYOB Advanced 2017.1 introduces the ability to change the customer ID in an existing sales order. You can change the customer ID even if the lines were already populated on the Document Details tab of the Sales Orders form (SO.30.10.00) for the existing order. Now you can start to create a sales order by copying and pasting another sales order, which you use as a template, and then changing the customer ID specified in the sales order to another one.
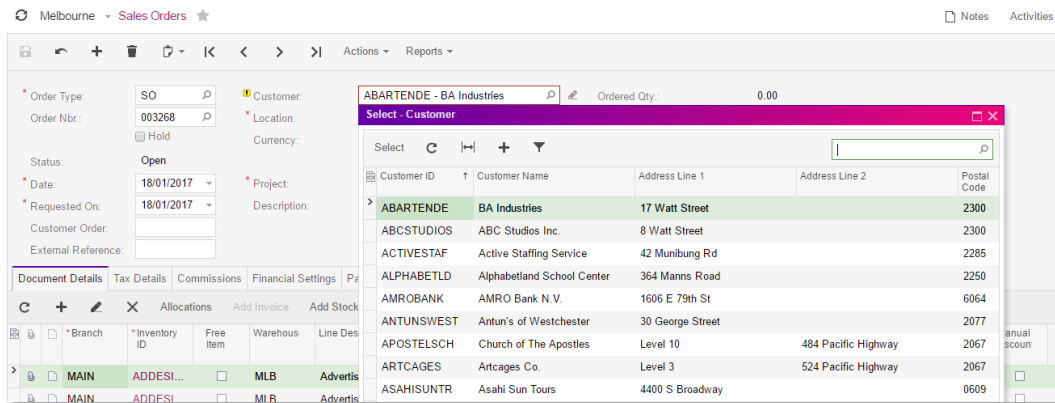
With this new feature, a user can create an order with a temporary customer ID (one that does not correspond to a real customer), allocate goods in inventory for the order, and then change the temporary customer ID to the real one once the prospect is ready to buy. Also, a user can create a quote, copy the quote to an order, and then change the customer ID in the copied order to the needed one. For more information on which document information is changed or preserved when the user overrides the customer ID, and for the list of restrictions on changing the customer ID, see "Sales Order Processing Options" in the MYOB Advanced User Guide.

Enhanced Access Rights Management

The management of access rights has been enhanced in MYOB Advanced 2017.1. The list of users can be managed more easily during user type configuration, and setup of access rights inheritance between system objects and their children is more convenient with new system functions. For more information about access rights in MYOB Advanced, see "User Security" in the MYOB Advanced User Guide.

Implemented Enhancements

The following enhancements have been introduced in MYOB Advanced 2017.1:

- The **Apply to Users** button has been added to the Allowed Roles tab of the User Types form (EP.20.25.00), as shown in the following screenshot. When you click this button, the system applies the default roles to all users of the selected user type.


- The Users tab has been added to the User Types form, as shown in the following screenshot. This tab displays the list of users that are assigned to the selected user type.

- The **Applies to Children** check box has been added to the Access Rights by Role (SM.20.10.25) and Access Rights by Screen (SM.20.10.20) forms; see the following screenshot, which displays the Access Rights by Screen form. On the Access Rights by Screen form, this check box indicates (if selected) that the access rights level for the role specified to the selected system object is the same for all nested objects (children) within the object. On the Access Rights by Screen form, this check box indicates (if selected) that the access rights level to the system object

specified for the selected role is the same for all nested objects (children) within the object.

- Tooltips have been added for nodes on the Access Rights by Role, Access Rights by Screen, and Access Rights by User (SM.20.10.55) forms that may contain the following information:

    o   For a suite or module: The page ID

    o   For a form: The form ID and the name of the business logic controller (as shown in the following screenshot)

    o   For all other nodes (for example, form elements): No information (that is, no tooltip is displayed)
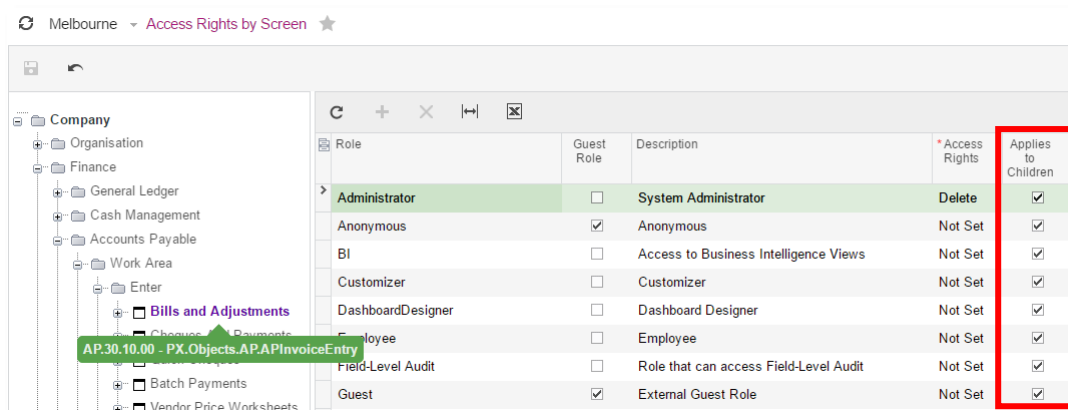
Integration with Power BI

In MYOB Advanced 2017.1, it is possible to not only build a Microsoft Power BI tile in a dashboard but also embed a Power BI report on a separate page. With this integration, users of MYOB Advanced will have at hand the information that they need for their work. For more information, see "Managing Integration with External Applications" in the MYOB Advanced User Guide.

In MYOB Advanced, the following types of integration with Power BI are supported:

- **Power BI**: This type is intended for reports created in Power BI. These reports are kept in a user's personal workspace. MYOB Advanced works with these reports on behalf of this user and uses the OAuth 2.0 protocol for integration. For this integration type, access tokens should be refreshed periodically.

- **Power BI Embedded**: With this type, the Microsoft Power BI Embedded tool is used for the integration of Power BI reports.

Either of these types can be used for adding Power BI reports in MYOB Advanced.

User Interface Changes

The following forms have been added to MYOB Advanced to support the integration with Power BI:

- **External Applications (SM.30.10.00)**: On this form, you can configure the integration with Power BI.

- **Application Resources (SM.30.10.10)**: Use this form to create pages for Power BI reports and edit the settings of an existing page with the report embedded. Before you add a resource in MYOB Advanced, you should set up integration with the external application that contains this resource on the External Applications form.

- **Refresh Application Access Tokens (SM.50.10.00)**: This form is used for refreshing access tokens for integrated external applications to prolong access to Power BI reports. Tokens can be refreshed manually, or the process can be scheduled for automated processing. When MYOB Advanced is integrated with an external application by using the OAuth 2.0 protocol, an access token is provided, which has a short lifetime for security reasons. Therefore, the access token needs to be refreshed periodically.

New Version of System Contract in the Contract-Based API

MYOB Advanced provides a contract-based web services SOAP API that external systems can use to get data records from MYOB Advanced, process these records, and save new or updated records to MYOB Advanced. For each endpoint that the contract-based API provides, a contract of the endpoint defines the entities, with their actions and fields, that are available through the endpoint and the methods that you can use to work with these entities. In previous versions, one version of the system contract was available, which was used by the system endpoint Default/5.30.001.

In MYOB Advanced 2017.1, Version 2 of the contract has been introduced, which provides the following new features, which are described in detail below:

- Access to all fields of an entity, including those that are not defined in the contract
- Selection of particular fields whose values are to be returned from MYOB Advanced

You can work with the new version of the contract through the system endpoint Default/6.00.001.

Access to All Fields of an Entity

In previous versions, through the contract-based web services API, you could work with only the fields that are defined in the contract of the endpoint and the custom fields that are defined in a customisation project (through the special CustomFields property of the needed entity). If you needed to work with the fields that are not defined in the contract of an endpoint, you created a custom endpoint and add the needed entities, fields, and actions to it.

In MYOB Advanced 2017.1, through the contract-based web services API, you can work with all fields, including those that are not defined in the contract, without creating a

custom endpoint. To work with the fields that are not defined in the contract of an endpoint, you should use the CustomFields property of the needed entity. In Version 2 of the contract, this property provides access to both the pre-defined elements on an MYOB Advanced form that are not included in the entity definition and the elements that were added to the MYOB Advanced form in a customisation project. However, this approach has a drawback: No compatibility guarantees are provided for the fields that are not defined in the contract. That is, if your code works with a field that is not defined in the contract and this field has been removed or modified in a new version of MYOB Advanced, your code will be broken and will require an update.

To get or set the value of an element that is not included in the entity definition, you should use the CustomFields property of the entity that contains this element. To work with the needed element in the CustomFields array, you specify the values of the FieldName and ViewName properties of the CustomField object of the needed type. In the ViewName property, you specify the name of the data view that contains the element, and in the FieldName property, you specify the name of the element.

The following code example illustrates the use of the CustomFields property:

```
Customer newCustomer = new Customer
{
  CustomerID = new StringValue { Value = "TEDSMITH" },
  CustomerName = new StringValue { Value = "Ted Smith" },

  //Specify the values of the custom fields
  MainContact = new Contact
  {
    CustomFields = new[]
    {
      new CustomStringField
      {
        FieldName = "UsrPersonalIDType",
        ViewName = "DefContact",
        Value = new StringValue { Value = "Passport" }
      },
      new CustomStringField
      {
        FieldName = "UsrPersonalID",
        ViewName = "DefContact",
        Value = new StringValue { Value = customerPersonalID }
      },
      new CustomBooleanField
      {
        FieldName = "UsrCreditRecordVerified",
        ViewName = "DefContact",
        Value = new BooleanValue { Value = true }
      }
    }
  }
};
```

For more details on the CustomFields property, see "CustomFields Property (Contract Version 2)" in the MYOB Advanced User Guide.

Selection of Particular Fields to Be Returned

In previous versions, the only way to restrict the number of fields that are returned when you request records from MYOB Advanced was to specify the value of the returnFullEntities parameter of the GetList() method. By using this parameter, you could specify whether the detail lines of master-detail records should be returned.

In MYOB Advanced 2017.1, you can specify which particular fields, linked objects, and details of entities you want to obtain when you request records from MYOB Advanced.

To specify the needed fields, linked objects, and details, you should use the ReturnBehavior property of the needed entity, which is available in Version 2 of the contract. By using the ReturnBehavior property, you can specify the following groups of fields whose values should be returned:

- No fields of the entity.
- Only the system fields—that is, the fields of the Entity class, such as ID, RowNumber, and Note.
- Only the specified fields of the entity and the system fields. You can specify the values to be returned or skipped by using the *Return and *Skip classes of the needed value type, such as StringReturn and StringSkip.
- All fields of the entity that are defined in the contract.

For more details on the ReturnBehavior property, see "ReturnBehavior Property (Contract Version 2)" in the MYOB advanced User Guide.

> **Note:** In endpoints with Contract Version 2, the GetList() method does not have the returnFullEntities parameter. If you want to restrict the number of returned fields, you should use the ReturnBehavior property of the needed entities.

Endpoint Extensions in the Contract-Based API

When you work with MYOB Advanced through the contract-based web services API, you use an endpoint to access the service. You can use either the required version of the system endpoint that has the predefined API and is available in the product by default, or create a custom endpoint, which you can configure by yourself. In previous versions, the only way to create a custom endpoint was to create it from scratch. That is, you had to add all of the required API elements and maintain this API by yourself.

In MYOB Advanced 2017.1, you can create custom endpoints of contract-based web services API not only from scratch, but also as extensions of existing endpoints. That is, you can use all the API of an existing endpoint without modification and add the entities, fields, and actions that you need. If you create a custom endpoint as an extension of a system endpoint, you are responsible for the maintenance of the API that you add. The API that is inherited from the system endpoint is maintained automatically.

You may need to create an extension of an endpoint if you want to use the entities that are defined in the contract of the existing endpoint but also need some additional entities, fields, and actions in the contract. For example, suppose the contract of the system endpoint with the name Default and version 6.00.001 contains the Address entity, which includes the following fields: AddressLine1, AddressLine2, City, Country, PostalCode, and State. Suppose that you want to add the new GPSCoordinates field to the Address entity of the contract and use it with another API of the contract. You cannot edit the contract of

the system endpoint; instead, you should create an endpoint that is based on this system endpoint, and add the new GPSCoordinates field to the Address entity of the contract of the new endpoint.

Create an extension for an endpoint on the Web Service Endpoints form (SM.20.70.60) by clicking **Extend Endpoint** on the form toolbar. For details, see "To Extend an Existing Endpoint" in the MYOB Advanced User Guide. For more information on endpoint extensions, see "Endpoint Extensions".

New Contract-Based REST API

MYOB Advanced 2017.1 introduces the new contract-based representational state transfer (REST) application programming interface (API). By using the contract-based REST API, a client application can create and update data records in MYOB Advanced, obtain records from MYOB Advanced, and process these records.

The REST API uses the same endpoints and contracts as the contract-based SOAP API, which was introduced in a previous version. That is, you can work with the same set of entities, fields, and actions that are defined by the contract of the endpoint through the REST API or the SOAP API. For the information on the contract-based API, see "Configuring the Contract-Based Web Services API" in the MYOB Advanced User Guide.

One of the main benefits of the REST API is that it is very easy to create and test requests: You don't need any custom libraries or special wrappers as you do for the SOAP API; you can create and test requests directly from your web browser. If your client application works with MYOB Advanced by using the contract-based REST API, in the application, you can use the standard HTTP methods for working with records in MYOB Advanced as follows:

- The GET HTTP method with different parameters: To retrieve all available records, the first N records from the list, the needed record by key fields, the list of records that satisfy the specified conditions, or a file attached to a record
- The PUT HTTP method: To create a record, update a record, or attach a file to it
- The POST HTTP method: To perform an action, such as releasing an invoice
- The DELETE HTTP method: To delete a record from MYOB Advanced

The records are passed to and from MYOB Advanced in the JavaScript object notation (JSON) format in the HTTP request body.

For information on how to use the REST API to work with records, see "Working with the Contract-Based REST API" in the MYOB Advanced User Guide.
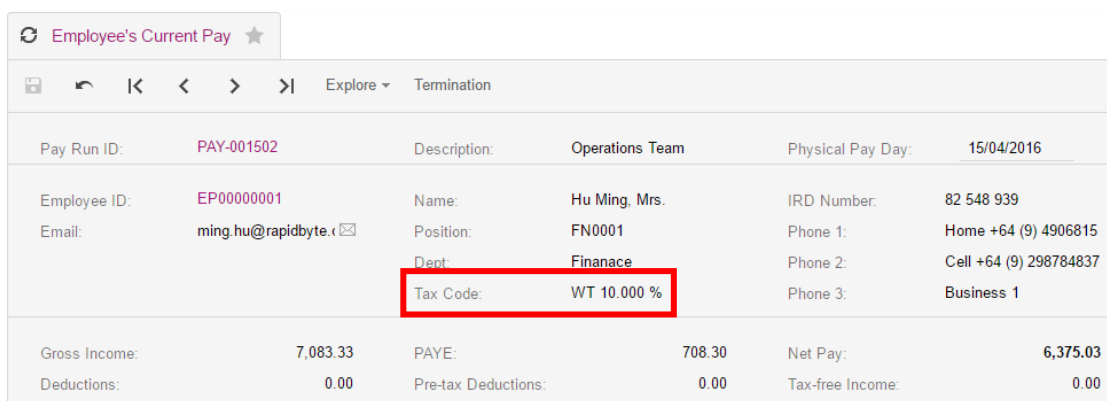
Payroll Compliance (NZ)

Updates to the WT Tax Code

Rules around schedular payment rules, for which the WT tax code is usually used, are changing as of 1 April 2017:

- Voluntary schedular payments have a standard rate of 20%.

- Most contractors will have the ability to choose their own withholding rate, subject to a minimum of 10%. (If the contractor provides their name and IRD number but does not choose a rate, the standard rate for the type of payment is to be used.)

- The non-notification rate changes to 45%.

Because employees who use the WT tax code can specify their tax rate, the **Tax @ (%)** field is available on the Taxation tab of the Pay Details form (MP.PP.23.10) when "WT - Withholding" is selected for the **Tax Code**. You should review all employee records for contractors and update them as required. (Refer to the IRD's website for clarification on which rates to use.)

When an employee with the WT tax code is included in a pay, their tax rate is displayed next to the tax code on the Employer's Current Pay form:

The IRD has also advised that contractors on the WT tax code should not have KiwiSaver payments deducted from their pay or included in the Employer Monthly Schedule (IR348). MYOB Advanced People's Dynamic Calculation Engine (DCE) overrides both KiwiSaver and the ACC Earners' Levy if they are configured in a pay item that is used for an employee with the WT tax code.

For more information on the WT tax code, and the responsibilities that employers and contractors have when dealing with it, see "Employee Tax Codes" in the Payroll section of the MYOB Advanced User Guide.

Breaking Changes

Multiple changes have been made since MYOB Advanced 2016.1.9 that may affect reports, customisations, and integrations that were built in a prior version. The basic changes are listed in this section. The complete list of the changes with the possible alternatives is provided in the *MYOB Advanced 2017.1 Technical Release Notes* document.

Removed Screens

No screens have been removed that were present in the prior versions.

Removed Tables

The following table lists the tables that have been removed from the database and possible replacements for these tables, where applicable.

Removed	Suggested Replacement
EPChangesetDetail	
EPActivityKvExt	
EPReminder	CRReminder
EPReminderKvExt	
AUNotificationHistory	
APBalances	
EPActivity	• CRActivity • SMEmail • PMTimeActivity

Removed Fields

The following table displays the fields that have been removed from the database and possible replacements for these fields.

Removed	Suggested Replacement
CRActivityRelation.RefTaskID	CRActivityRelation.RefNoteID
CRActivityRelation.TaskID	CRActivityRelation.NoteID
CRActivityStatistics.LastIncomingActivityID	CRActivityStatistics.LastIncomingActivityNoteID
CRActivityStatistics.LastOutgoingActivityID	CRActivityStatistics.LastOutgoingActivityNoteID
CSAnswers.EntityID	CSAnswers.RefNoteID
CSAnswers.EntityType	CSAnswers.RefNoteID
CSAttributeGroup.Type	CSAttributeGroup.EntityType
EPAttendee.EventID	EPAttendee.EventNoteID
EPAttendeeMessage.EventID	EPAttendeeMessage.EventNoteID
EPOtherAttendee.EventID	EPOtherAttendee.EventNoteID
EPOtherAttendeeMessage.EventID	EPOtherAttendeeMessage.EventNoteID
EPTimeCardSummary.ParentTaskID	EPTimeCardSummary.ParentNoteID
GIDesign.PrimaryScreenAsPopup	GINavigationScreen.WindowMode
GIDesign.PrimaryScreenID	GIDesign.PrimaryScreenIDNew
GIResult.SuppressNav	GIResult.DefaultNav and GIResult.NavigateTo
ListEntryPoint.EntryScreenNodeID	ListEntryPoint.EntryScreenID
ListEntryPoint.ListNodeID	ListEntryPoint.ListScreenID

Modified Field Types

No data types have been modified in comparison to the prior versions.

Removed Data Access Classes

The following table lists the data access classes (DACs) that have been removed from the database.

Namespace	Class Name
PX.SM	EMailAccountMaint+EPActivity
PX.Data	PXFieldScreenToSiteMapAddHelper<T>+SiteMapInternal
PX.Objects.EP	EmployeeActivitiesEntry+EPActivityFilter
PX.Objects.EP	NavigationFilter
PX.Objects.EP	EmailEnq+Box
PX.Objects.EP	EmailEnq+MailBoxFilter
PX.Objects.EP	EmailEnq+EmailFilter
PX.Objects.EP	EPChangesetDetail
PX.Objects.EP	EPReminder
PX.Objects.CR	SimpleCase
PX.Objects.CR	MyCasesByCustomerMaint+Filter
PX.Objects.CR	MyCasesByCustomerMaint+CaseInfo
PX.Objects.CR	MyCaseDetailsMaint+EPActivityWithOwner
PX.Objects.CR	IMessage
PX.Objects.CR	EPMessage
PX.Objects.CS	CSAnswers2

Activity Record Redesign

If an integration uses the EPActivity data access class and has been implemented in an earlier version of MYOB Advanced, it has to be reconsidered and adjusted for use with MYOB Advanced 2017.1; integrations are not compatible across versions. Also, you may need to review integrations and customisations that involve time cards and time activities.

MYOB Advanced partners that have integration with MYOB Advanced Self-Service Portal implemented should be aware that upgrading the Self-Service Portal to 2017.1 may cause it to malfunction; this will require review by your developer

As a result of the redesign of this data access class, any type of activity (event, task, email, or activity) created in MYOB Advanced 2017.1 is stored as a CRActivity record or one of the following combinations of different types of records:

- CRActivity and PMTimeActivity
- CRActivity and SMEmail
- CRActivity, SMEmail, and PMTimeActivity

PMTimeActivity and SMEmail records can represent self-sufficient entities: An SMEmail record can be an abridged version of an email (system email), and a PMTimeActivity record can be created on the Employee Time Card (EP.30.50.00) or Employee Time Activities (EP.30.70.00) forms, with no related CRActivity record created.

During an upgrade to 2017.1, custom fields and database indexes used in the older version are preserved in the Obsolete_EPActivity table. A custom field is likely an add-up to the new PMTimeActivity table, so the following script template can be used to transfer custom data.

```
UPDATE PMTimeActivity
SET UsrField1 = E.UsrField1,
UsrField2 = E.UsrField2
FROM PMTimeActivity T
INNER JOIN Obsolete_EPActivity E
ON E.CompanyID = T.CompanyID AND E.NoteID = T.RefNoteID
```

After the script is run, the Obsolete_EPActivity table can be deleted to save database space.

Resolved Issues

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

Organisation and Projects

Problem ID	Description
Organisation and Projects	
135712482758 135687318161	Activities created on the Activities form (EP.40.43.00) did not link to the selected business account. This has been resolved.
-	The email body of all emails was not displayed on the MYOB Advanced Partner Portal. This has been resolved.
-	The value of the **Billable Time** element was different for the same employee on the Employee Time Card data entry form (EP.30.50.00) and on the Employee Time Card generic inquiry form (EP.40.60.00). This has been resolved.
-	A user could not filter tasks by date on the Tasks form (EP.40.40.00) due to a performance issue. This has been resolved.
-	When a user selected a customer ID in the **CustomerID** box on any form that contains this box and clicked a pencil near this box, the Vendors form (AP.30.30.00) was opened instead of the Customers form (AR.30.30.00) if a customer with the selected ID had been extended to a vendor. This has been resolved.
-	On the Approval Details tab of the Expense Claim form (EP.30.10.00), all information about the approver (except for the workgroup) was missing if the employee assigned to approve the document was previously removed from the workgroup. This issue has been resolved; when an approver is assigned to a document, the system no longer validates whether the approver is included in a workgroup.
-	If a user clicked the **View Allocation Source** button on the Project Transactions form (PM.30.40.00), an incorrectly large number of duplicates of the same allocation transaction was displayed in the case of an allocation chain, which is a situation when a source project transaction for the current allocation step is obtained as the result of another allocation. This has been resolved.
-	On the Employee Time Card form (EP.30.50.00), there was no ability to import records from Excel to the Summary area. This has been resolved.
-	An allocation rule configured on the Allocation Rules form (PM.20.75.00) that had the Allocate Budget method and the **Reverse Allocation** parameter with the On Project Billing value in its settings produced the wrong allocated amount, which resulted in incorrect successive allocations for the same task. This has been resolved.
-	In the Time & Expenses module and Projects module, some labels and warning messages could not be translated to other languages. This has been resolved.

Problem ID	Description
-	The error message "Invalid field name 'EPExpenseClaim.EmployeeID_EPEmployee_acctName' specified" appeared when a user attempted to run the reports: • Expense Claim Details (EP.61.30.00) • Expense Claim Details by Employee (EP.61.40.20) • Expense Claim Details by Department (EP.61.40.10) This has been resolved.
-	The error "Nullable object must have a value" could appear when a user tried to release a time card on the Employee Time Card (EP.30.50.00) or the Release Time Cards (EP.50.50.00) forms. This has been resolved.
-	MYOB Advanced now provides functionality that you can use to set up the process of approving expense receipts submitted by employees of your company. To configure the approval process, you must enable the Approval Workflow feature and specify an approval map in the Expense Receipt Approval Map box on the General Settings tab of the Time and Expenses Preferences form (EP.10.10.00). Based on the map, to submitted expense receipts, authorised approvers are assigned and, optionally, notified by email about the receipts pending their approval. Expense receipts can be approved or rejected by using the **Approve** or **Reject** actions on the Expense Receipt form (EP.30.10.10). Also, receipts can be approved on the Approvals form (EP.50.30.10). Once approved, expense receipts can be claimed if approval is required for the receipts based on the conditions specified in the approval map. Rejected receipts can be put on hold for a user to adjust it and re-submit. New statuses of expense receipts have been introduced in the scope of this feature: • On Hold: The receipt is new and has not been submitted for approval yet. • Open: The receipt is ready to be claimed after it has been approved (if approval is required for the receipt) or after it has been submitted for further processing (if approval is not required). • Pending Approval: The receipt is pending approval. • Rejected: The receipt has been rejected. For more information on expense receipts approval, see "Processing Expense Claims" in the MYOB Advanced User Guide.
-	If the branch had been changed for an employee, the employee got incorrect company name assigned. This has been resolved.
-	If there were same attributes for a business account and customer or vendor, the attribute values of Business Account became erased after upgrade. **Note:** If a Business Account and its Customer record had same attribute and different values then system will leave value from Customer record. Contact Support to help copying attribute values from Customer record to Business Account record
-	The project billing process executed for a customer whose currency differed from the base currency generated invoices with the currency rate missing. As a result, the invoices had wrong amounts in the base currency. A workaround is available: Users must manually specify the correct currency rate for the generated invoice by using the Invoices and Memos form (AR.30.10.00).
-	An error message appeared when a user tried to add an activity in the Tasks & Activities dialog box invoked from the Employee Time Cards form (EP.40.60.00). This has been resolved.
-	Wiki revisions were not published when processing them on the Wiki Articles form (SM.20.20.25). This has been resolved.

Problem ID	Description
-	It was not possible to restore a deleted user on the Contacts form (CR.30.20.00). This has been resolved.
-	Image embedded to the body of an email were displayed as attachments. This has been resolved.
-	If a user selected the Business Account and Settings export mode when creating a snapshot on the Companies form (SM.20.35.20), no attributes for customer records were transferred to the snapshot. This has been resolved.
-	If a user selected the **Add Work Item** action on the Activity History tab of the Projects form (PM.30.10.00), the work item was created with the **Billable** check box cleared, even if the default earning type that was inserted into the work item had the **Billable** check box selected. This has been resolved.
-	The Equipment form (EP.20.80.00) was available only if the "Project Management" feature was enabled on the Enable/Disable Features form (CS.10.00.00), while it might be needed for fixed asset management or service management. This has been resolved.
-	The error "Financial period … is inactive" occurred when a user tried to use the Reverse Unbilled Transactions form (PM.50.50.00) for transactions that were created in an already closed financial period, because the system attempted to create the reversal transactions to the financial period of the original transaction. This has been resolved.
-	On the Approve Time Card Summaries (EP507030) form, in the Employee column of the table, names of employees were not displayed. This has been resolved.
-	The size restriction option was eliminated from the system email accounts. That is, the **Maximum Message Size** box was removed from the Content tab on the System Email Accounts form (SM.20.40.02). **Note:** This change may cause emails to be received that were previously filtered out by the size restriction option.
-	When a user changed the exchange synchronisation policy name or colour on the Exchange Synchronisation Policies form (SM.20.40.10), the changes did not affect the Outlook synchronisation process. This has been resolved; right after a user saves the changes of policy name or colour, the changes automatically affect the Outlook synchronisation process.
-	In the Customer Management module, on the Activities tab of all entry forms, the default filter option was set to Open Activities. This has been resolved; the default filter option is now set to All Activities.
-	The functionality that enables a user to configure email notifications to approvers of wiki articles has been removed.
-	The Equipment form (EP.20.80.00) was available only if the "Project Management" feature was enabled on the Enable/Disable Features form (CS.10.00.00). The Equipment form is now available regardless of whether the Project Management feature is enabled, because it might be needed for fixed asset management or service management.

Distribution

Problem ID	Description
138003204461 137766055301	An error message appeared on the Adjustments form (IN.30.30.00) when attempting to release a stock adjustment. This has been resolved.
-	A landed cost amount that was allocated to partially or fully issued purchase receipts was recorded to the Landed Cost Variance account instead of the Cost of Goods Sold (COGS) account. This has been resolved; landed cost amount that is allocated to partially or fully issued purchase receipts is always recorded to the COGS account.
-	If the value in Price/Cost Decimal Precision on the Branches form (CS.10.20.00) was higher than the value in Decimal Precision specified for the currency or for the base currency on the Branches form (CS.10.20.00), under some circumstances, on the Sales Order form (SO.30.10.00), a line entered on the Document Details tab with the 100% discount might result in a small negative value in the Ext Price column for the line and in Order Total in the Summary area, which blocked the order. This has been resolved; CuryExtPrice now uses currency precision instead of price/cost precision.
-	It was possible to add a kit non-stock item to an invoice on the Invoices (SO.30.30.00) form. This has been resolved; it is no longer possible to add a kit non-stock item to a document by using the Document Details tab on the Invoices (SO.30.30.00), Bills and Adjustments (AP.30.10.00), Invoices and Memos (AR.30.10.00), or Cash Sales (AR.30.40.00) forms.
-	Inventory allocation records could remain on the Inventory Allocation Details form (IN.40.20.00) for shipment lines with items tracked by serial numbers if the **Add Zero Lines for Items Not in Stock** check box was selected on the Sales Orders Preferences form (SO.10.10.00). This has been resolved.
-	The values in the Average Cost column on the Document Details tab of the Sales Orders form (SO.30.10.00) were rounded according to the currency precision, whereas they should had been rounded according to the value in Price/Cost Decimal Precision on the General Info tab of the Branches form (CS.10.20.00). This has been resolved.
-	On the Shipping Settings tabs of the Sales Orders (SO.30.10.00) and Shipments (SO.30.20.00) forms, in the **FOB Point**, **Shipping Terms**, and **Shipping Zone ID** boxes, identifiers of the selected values were shown without descriptions. This has been resolved.
-	If the default warehouse was created by the system without address and contact data on the Address Information tab of the Warehouses form (IN.20.40.00), for a purchase order with Shipping Destination Type set to Warehouse and Warehouse set to the default warehouse on the Purchase Orders form (PO.30.10.00) and in some other situations, the system produced the error 'RevisionID' may not be empty. This has been resolved; the error message 'RevisionID' may not be empty' is replaced with the error messages that state that the address or the contact is not specified for the selected destination warehouse or for the warehouse selected on the Shipping Instructions tab of the Purchase Orders form (PO.30.10.00). If the Multiple Warehouses feature is enabled on the Enable/Disable Features form (CS.10.00.00) and a warehouse without address or contact data is selected in To Warehouse on the Create Transfer Orders form (SO.50.90.00), the error is generated with a link to the corrupted warehouse.
-	On the Update ABC Code form (IN.50.60.00), the value in the Criteria Value column was calculated incorrectly. This has been resolved.

Problem ID	Description
-	On the Item Warehouse Details form (IN.20.45.00), the values specified in the **Sales Unit** box and the **Purchase Unit** box did affect any functionality. This has been resolved; the **Override Unit of Measure** check box was added to the General Settings tab of the Item Warehouse Details (IN.20.45.00) form. With this check box selected, the UOM will be overridden once the warehouse is changed in a document.
-	On the Shipments form (SO.30.20.00), in the Allocations dialog box, a user could not manually split the quantity of stock item components of a non-stock kit by different lot numbers. This has been resolved.
-	On the Purchase Receipts form (PO.30.20.00), it was possible to create and save two equal transfer receipts for one line of a transfer shipment. This has been resolved; error message "The item in this transfer line is already received according to the X line of the Y PO receipt" is displayed if a duplicated transfer receipt is saved for a transfer shipment line.
-	If one component or multiple components of a non-stock kit had zero in **Component Qty.** on the Kit Specifications form (IN.20.95.00) and, for a sales order on the Sales Orders form (SO.30.10.00), **Shipped Qty.** on the Shipments tab was less than Quantity on the Document Details tab, the sales order had failed on the Create Shipment action with the error "Attempted to Divide by Zero". This has been resolved.
-	If a non-stock kit component had the "Inactive" item status on the Kit Specifications form (IN.20.95.00) and the Create Shipment action with this non-stock kit was performed on the Sales Orders form (IN.20.95.00), the system produced the error Non-Stock kit cannot be added as a component. This has been resolved; the error "The component of the kit is inactive" is displayed in this case.
-	On the Sales Orders form (SO.30.10.00), if the **Copy Order** action was used to copy the selected sales order to a new one, the values of the **Mark for PO** check boxes on the Document Details tab were not copied. This has been resolved.
-	Under some circumstances, the NullReferenceException error was returned in a Contract-Based SOAP API call that attempted to update a value on the Customers form (AR.30.30.00). This has been resolved.
-	When a user was linking a sales order line that had been marked for a Drop-ship purchase order on the Document Details Tab of Sales Orders form (SO.30.10.00) with an order that included a not released PO Receipt, the value of the Quantity field in the sales order had been increased. This has been resolved.
-	When a user added data on the Cross-Reference tab of the Non-Stock items form (IN.20.20.00), the system displayed an error message in some special cases when the Inventory Subitems feature was activated on the Enable/Disable Features form (CS.10.00.00). This has been resolved.
-	In the invoices that were generated during the processes of sales order billing, project billing, or contract billing, document descriptions and line descriptions were not translated to the customer's language, which is specified in the **Locale** box on the General Info tab of the Customers form (AR.30.30.00). This has been resolved.
-	A user could not edit the **Markup %** box value on the General Settings tab of the Item Classes form (IN.20.10.00). This has been resolved.
-	A user could not drill down to a sales order of IN or CM type by clicking the **Order Nbr.** column value on the Inventory Lot/Serial History form (IN.40.70.00). This has been resolved.

Problem ID	Description
-	When a user changed an address on the Financial Settings tab of the Sales Orders form (SO.30.10.00) and then created a copy of a sales order (for example, by using the Copy Order action), a value of the **Customer Tax Zone** box on the Financial Settings tab was replaced with the default value. This has been resolved.
-	On the Kit Assembly form (IN.30.70.00), when a kit disassembly document was released for a lot/serial tracked stock kit, the wrong warehouse was defined for the stock components if the kit had been transferred from one warehouse to the warehouse where it was disassembled. This has been resolved.
-	A value of the Average Cost field on the Document Details tab of the Sales Orders form (SO.30.10.00) was incorrectly changed to 0 after a user saved a sales order. This has been resolved.
-	Reports in the Distribution suite had different default paper formats. This has been resolved.
-	The value of the Use Customer's Account check box that was specified on the Shipping Settings tab of the Sales Orders form (SO.30.10.00) had been incorrectly changed to the default value on the Shipments form (SO.30.20.00) after a user had created a shipment. This has been resolved.
-	Performance of the Rebuild Full-Text Entity Index form (SM.20.95.00) has been improved.
-	On the Sales Orders form (SO.30.10.00), the wrong total amount could be saved for an order if a document line with an empty UOM value, non-zero quantity and non-zero unit price was added to the order. This has been resolved.
-	On the Sales Orders form (SO.30.10.00), under some circumstances a user could create a sales order of the IN order type with an empty Lot/Serial Nbr. column in the Allocations dialog box. This has been resolved.
-	On the Sales Orders form (SO.30.10.00), the line discount in the Discount Percent column was recalculated after a user copied an order by using the Copy Order action. This has been resolved.
-	In some cases, the system did not update the **Last Cos**t box in the Cost Statistic section on the Price/Cost Info tab of the Stock items form (IN.20.25.00) when a user changed the value in the **Last Cost** box on the Price/Cost Information tab of the Items Warehouse Details form (IN.20.45.00). This has been resolved.
-	If a default vendor was specified for a stock item on the Vendor Details tab of the Stock Items form (IN.20.25.00), the setting of the **Apply Line Discount to** box on the Accounts Receivable Preferences form (AR.10.10.00) was ignored for a discount specified in the document line of the item. This has been resolved.
-	In some cases, rounding difference could lead to error "Updating item in warehouse caused cost to quantity imbalance" on In Adjustment release when the stock item was going to be issued fully. This has been resolved.
-	On the Sales Order form (SO.30.10.00), on the Document Details tab, it was possible to select the **Mark for PO** check box of the Drop-Ship PO source for the line with misc. charge line type when a user had selected the **Require Receipt** and **Require Shipment** check boxes for the non-stock Item on the Non-Stock Items form (IN.20.20.00) after that items had been added to the sales order. This has been resolved.
-	On the Sales Orders form (SO.30.10.00), the Recalculate Avalara TAX action were available if the "Avalara Tax Integration" feature was disabled on the Enable/Disable Features form (CS.10.00.00). This has been resolved.

Problem ID	Description
-	Under certain conditions, inventory allocation records of the Kit Assembly Supply type for components of a stock kit remained in the database and could be observed on the Inventory Allocation Details form (IN.40.20.00) after a kit assembly production transaction had been released. This has been resolved.
-	When a debit adjustment with landed cost was applied to a bill, then when releasing debit adjustment on the Checks and Payments form (AP.30.20.00), the system created an unnecessary inventory adjustment on the Adjustments form (IN.30.30.00). This has been resolved.
-	On the Shipments (SO302000) form, when a user performed the Correct Shipment action for a shipment that had packages on the Packages tab of the form and had already been posted to Inventory, the shipment was assigned the Open status. This has been resolved.
-	In some cases, when the **Mark for PO** check box was selected, and **PO Source** was set to "Drop-Ship" for the sales order lines on the Document Details tab of the Sales Order form (SO.30.10.00), and more than one purchase order was created for this sales order, then when preparing an invoice on the Invoices form (SO.30.30.00), the row order in the invoice could differ from the row order in the sales order. This has been resolved; in the resulting invoice, the lines are sorted by receipt number.
-	On the Request form (RQ.30.10.00), in the **Sub.** column, the system did not show a list of available options. The system allowed a user to enter new data to the column when the **On-The-Fly Entry** check box was cleared for the subaccount segmented key on the Segmented Keys form (CS.20.20.00). This has been resolved.

Finance

Problem ID	Description
136795059699 136507411841	Recurring GL journals would not process if there was a GST line in the journal. This has been resolved.
140348442706 140318373121	Scheduled GL journals failed to run if they had been created with the **Create Tax Transactions** option on. This has been resolved.
133892863818 133622445331	An error message appeared on the Reclassify Transactions form (GL.50.60.00) when restriction groups were active. This has been resolved.
-	A customer refund applied to a credit memo was not displayed in the list of the credit memo applications on the Application History tab of the Payments and Applications form (AR.30.20.00). This has been resolved.
-	There was no ability to review the documents that were matched to the transactions imported from the bank statements. This has been resolved; the **View Matched Document** button has been added to the table toolbar on the Import Bank Transactions form (CA.30.65.00). When you select a matched transaction and click the button, the system navigates to the form, where you can view details of the matched document or the batch for the selected transaction. The button is available for only the matched transactions.
-	If the **Validate Document Total on Entry** check box had been selected on the Accounts Receivable Preferences form (AR.10.10.00), it was not possible to generate recurring invoices with taxes calculated by Avalara AvaTax. This has been resolved.

Problem ID	Description
-	The **Keep Transactions for n Periods** settings were not utilised by the system but were available on the module preferences forms, which was confusing for users. This has been resolved; the **Keep Transactions for n Periods** box has been hidden from the following forms: • General Ledger Preferences (GL.10.20.00) • Accounts Payable Preferences (AP.10.10.00) • Accounts Receivable Preferences (AR.10.10.00) • Inventory Preferences (IN.10.10.00) • Time and Expenses Preferences (EP.10.10.00) • Currency Management Preferences (CM.10.10.00)
-	The parameters on all financial report forms have been unified: The same captions are used for user interface elements (such as boxes and check boxes) with the same meaning on all report forms, and user interface elements have been rearranged on these forms. This has been resolved.
-	**Consolidate Posting to GL** was in the list of features on the Enable/Disable Features form (CS.10.00.00), although it is a posting option. This has been resolved; the **Consolidate Posting to GL** feature has been removed from the Enable/Disable Features form and replaced by the **Generate Consolidated Batches** check box, which is now located on the General Ledger Preferences form (GL.10.20.00) in the Posting and Retention Settings section.
-	On the Generate Recurring Transactions forms in the Accounts Payable and Accounts Receivable modules (AP.50.40.00; AR.50.40.00), the processes copied taxes from the scheduled documents into the recurring documents, instead of recalculating taxes based on the tax settings that were effective on the generated document dates. This has been resolved.
-	On the Run Contract Billing form (CT.50.10.00), when a user clicked the contract ID hyperlink just after the billing process had been completed, the system opened the Customer Contracts form (CT.30.10.00) in the new window, but displayed an incorrect contract status in the window. This has been resolved.
-	The default size of the Bank Transaction Rules dialog box, which is invoked on the Process Bank Transactions form (CA.20.45.50), was not big enough to fit all elements. On the dialog box, uppercase letters were not used to display the name of the rule entered by a user into the **Rule** box.
-	On the Cash Sales (AR.30.40.00) and Quick Checks (AP.30.40.00) forms, the **Transaction Descr.** box did not support localised item descriptions.
-	The ability to add and allocate landed costs to transfers has been added. Users can add landed costs directly to receipts of the Transfer Receipt type on the Purchase Receipt form (PO.30.20.00) or to bills on the Bills and Adjustment form (AP.30.10.00) and allocate them by using the same allocation methods as were developed for purchase receipts. Also, for stock items with the FIFO valuation method, a new cost layer with the date of the transfer receipt has been created.
-	If a currency was specified for a vendor account in the Currency ID box on the Vendors form (AP.30.30.00), the system did not allow to register a request for prepayment to be made from a cash account in the currency other than the vendor currency. This has been resolved.
-	On the Numbering Sequences form (CS.20.10.10), it was possible to delete a numbering sequence that had been used for generating identifiers for documents in the system. After that, users were not able to review the documents that were numerated by using the deleted sequence. This has been resolved.

Problem ID	Description
-	The reclassification of GL transactions was implemented. With this functionality, users can: • Reclassify the 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. The reclassification process generates 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. **Note:** Because of changes made to the Journal Transactions (GL301000) form as a part of the Reclassification of GL Transactions 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.
-	On the Sales Price Worksheets from (AR.20.20.10), users experienced performance issues while uploading sales prices from Excel files containing more than 10,000 records. This has been resolved.
-	When taxable General Ledger transactions were uploaded from an Excel file to the Journal Transactions form (GL.30.10.00), for the entries posted to the Tax Payable or Tax Claimable accounts, the system did not fill in the **Tax ID** box with the tax code specified in the file. This has been resolved.
-	The Retained Earnings account was updated twice on posting of some GL entries that were close to the end of a financial year (when a period of a transaction was in the current year and a date was in the next year), which caused balance discrepancy. This has been resolved.
-	Some MYOB Advanced reports could give incorrect results on MySQL due to differences in the implementation of the '+' operator for strings in MySQL and MSSQL. This has been resolved.
-	If the Skip Voided Transactions check box had been selected on the Cash Management Preferences form (CA.10.10.00), it was not possible to release a reconciliation statement if it contained a zero-amount record that corresponded to a pair of cleared payment and non-cleared void payment. This has been resolved.
-	On the Cheque Register form (CA.30.30.00), in the Quick Transaction dialog box, users could not register a cash entry if the subaccount specified in the **Offset Subaccount** box had not been created in the system beforehand (although the **On-The-Fly Entry** check box was selected for the SUBACCOUNT segmented key on the Segmented Keys form (CS.20.20.00)). This has been resolved. This has been resolved.
-	When a user initiated a process on the Calculate Depreciation form (FA.50.20.00), the process failed with an error if there was no period that corresponded to the asset receipt date in one or more books associated with the asset. This has been resolved.
-	In some cases, changing a payment amount to zero in an Accounts Payable payment after the failed attempt to save it left a record that was not linked to the payment in the CATran table. This has been resolved.
-	When a user imported a new report definition for an existing report, all data source values were cleared in a column set of the report. This has been resolved.
-	Invoices generated by the recurring contract billing process and the contract renewal process contained descriptions of the non-stock items shown in the current user locale instead of the customer locale. This has been resolved.

Problem ID	Description
-	On the Release AR Documents form (AR.50.10.00) and on the Prepare Dunning Letters form (AR.52.10.00), if a user selected one record or multiple records on the page, navigated to another page, and then returned, the unlabelled check box used to select the records became cleared. This has been resolved.
-	If a custom action was added to the **Action** box on the Print Invoices and Memos form (AR.50.80.00), filters did not work. This has been resolved.
-	A user could not dispose of a fixed asset on the Fixed Assets form (FA.30.30.00) that was associated with two books that had different calendars if the date of the disposal belonged to different periods in the books and the Depreciate before disposal check box had been selected in the Disposal Parameters dialog box. This has been resolved.
-	If a user had reconciled some of the payments included into a batch payment and then selected the **Match Bank Transactions to Batch Payments** box for the cash account, the total of the batch appeared in the reconciliation statement instead of the total of the unreconciled payments. This has been resolved.
-	If a user had access to one branch only, he or she could not select his or her branch in the **Shipping Branch** box on the Customer Locations form (AR.30.30.20) because the box was inactive. This has been resolved.
-	When a user clicked the **Customer ID** hyperlink in the Customer Summary report (AR.65.05.00), he or she was incorrectly navigated to the Business Accounts form (CR.30.30.00) instead of the Customers form (AR.30.30.00). This has been resolved.
-	On the Transactions form (CA.30.40.00), if a user created a cash entry by using the Reverse action applied to a taxable cash entry that had been included into a tax report, the new cash entry was included in the same tax period as the original cash entry and had incorrect sign. This has been resolved.
-	Gains or losses incurred on inter-branch fund transfers were posted to the Cash-In-Transit Account under the wrong branch. This has been resolved.
-	It was not possible to import bank statements in the OFX 2.2 format. This has been resolved.
-	If in a scheduled General Ledger batch a user added or modified entries to be posted to a cash account, the system incorrectly created records in the CATran table, which were reflected on the Check Register (CA303000) form as unreleased transactions. This has been resolved.
-	If the **Validate Document Totals on Entry** check box was selected on the Accounts Receivable Preferences form (AR.10.10.00), the system could not generate recurring Accounts Receivable invoices with taxes calculated by the Avalara AvaTax tax calculation service. This has been resolved.
-	In Accounts Payable and Accounts Receivable taxable documents that were generated recurrently based on a schedule, the system copied taxes and tax rates from the scheduled documents instead of using the tax settings effective on the date of document generation. This has been resolved; the system now copies the tax zone and tax categories from the scheduled document and applies taxes based on these settings using the tax rates effective on the document date.
-	The FA Balance by GL Account report (FA.64.30.00) showed zero balance for a fixed asset which was reconciled with a purchase transaction posted to the fixed assets account associated with the asset. This has been resolved.

Problem ID	Description
-	It was not possible to adjust VAT for a discount taken on early payment by using the Generate VAT Credit Memos form (AR.50.45.00) if the payment had been made by a parent account. This has been resolved.
-	If a user changed a branch on the Financial Details tab of the Tax Adjustments form (TX.30.10.00) for a tax adjustment document that had already some lines entered, the taxes were adjusted in the wrong branch. This has been resolved.
-	If a user had created a payment on the Process Bank Transactions form (CA.30.60.00) by matching a bank transaction to an invoice, and later the payment was voided by a user, it was not possible to match the invoice to another bank transaction. This has been resolved.
-	Because a formula used in the report generated on the Transactions for Account form (GL.63.35.00) had been modified by the translation process, no account number and description were displayed in the report. This has been resolved; the Collect Strings process no longer collects constants used in formulas.

People

Problem ID	Description
138387069178 138384961296	If an employee was included in multiple pay groups, the YTD superannuation amounts on their payslips included only payments made for one pay group. This release adds header fields to employee payslips, showing the YTD totals of all Employer Super pay items.
141149883216 141079104788	In some cases, employees' superannuation fund member IDs were not saved in snapshots. This has been resolved.
141080092934 141047162981	Superannuation amounts loaded using the YTD loading Import Scenario were not added to the YTD Superannuation SGC value on employees' payslips. This has been resolved.
141664841716 141664841606	The error message "Object reference not set to an instance of an object" could appear when opening an employee from the Pay Distribution (MP.PP.23.30) form. This has been resolved.
141657736608 141488240731	In some cases, employees' leave accruals would appear in a pay run, but not on payslips after the pay run was completed. This has been resolved.
141677797682 141652440201 **141677797663** 141652440225	This release updates some employees' super fund details, which were not being refreshed.
141413465663 141381727791	Unit, Type and Rate did not appear for Personal Leave on employee payslips. This has been resolved.
141664841870	In some cases, duplicate records appeared when searching for employees from the Pay Groups (MP.PP.27.10) and Pay Distribution (MP.PP.23.30) forms. This has been resolved.
-	In some cases, when attempting to add a balanced journal to a recurring transaction the row did not populate and an error message repaired. This has been resolved.

Problem ID	Description
-	If a user created a new employee and entered payment details for them on the Employees form (EP.20.30.00), but did not open and save the employee from the Pay Distribution (MP.PP.23.30) form, then when a pay that included the employee was completed, the error message "payment method is missing" appeared. This has been resolved; employees' payment details, if present on the Employees form, are used in the Payroll module without having to go through the Pay Distribution form.
-	In some cases, payslips were generated for employees with a Net Pay of $0.00. This has been addressed; the selection column on the Pay Run Details form (MP.PP.31.20) makes it easy to remove employees with $0.00 pay from a pay run.
-	In some cases, employees' superannuation fund member IDs were missing or incorrect. This has been resolved.
-	The **Last Edited** field on the Manage Pays (MP.PP.41.10) and Pay Run Details (MP.PP.31.20) forms now displays the user ID, rather than the first and last names of the user who made the changes.
-	This release updates the logic for calculating an employee's average weekly earnings; the system now uses the previous 52 weeks to calculate the average, where previously it calculated using the previous 12 months.
-	The 2016.1.11 release added validation to the Employees form (EP.20.30.00) when the Payroll module is activated: the system checks that the Cash Account specified on the Financial Settings tab is associated with the correct branch for the employee. However, this validation could prevent employee records from being saved even if they weren't part of the payroll system, or if the payroll system was not yet in use. This has been resolved; the validation is now performed only for users that have been added to the payroll system by setting up their details on the Pay Details form (MP.PP.23.10).
-	After setting date filters on the Entitlement History (MP.PP.44.00), Superannuation Transactions (MP.PP.43.00), or Pay History (MP.PP.41.20) forms, data would disappear from some columns and some values would be incorrect. This has been resolved.
-	After changing an employee's Payroll Posting Class on the Pay Details form (MP.PP.23.10) and creating a new pay run, the employee would still have their old posting class; the update would not appear in the Current Pay. This has been resolved.
-	The error message "Sequence contains no elements" could appear on the Pay Run Details form (MP.PP.31.20) form after selecting all employees by clicking on the tick box at the top of the selection column and then selecting **View Journal Entries** from the Actions dropdown. This has been resolved.

System and Platform

Problem ID	Description
137919960080 137538369701	In some cases, a generic inquiry would only show the first page of results. This has been resolved.
132307641750 132285363536	It was not possible to use the Advanced OnTheGo mobile app on sites where there was only one company and the, if the user had an @ symbol in their username. This has been resolved.
-	When a user added mapping for a field with the PXIntListAttribute attribute by using the Populate Fields dialog box, which is invoked on the Web Service Endpoints form (SM.20.70.60), the system generated mapping of the IntValue type. As a result, a custom application that used this field generated the "Error in deserialising body of reply message for operation 'Get'" error message when it tried to retrieve any entity of this type. This has been resolved.
-	A custom endpoint was not working if it was located not in the first (System) company. This has been resolved.
-	The DITA button with its commands has been removed from the Wiki form (SM.20.20.05).
-	The "Project Task cannot be found" error message occurred during the processing of an email that had a link to a project or a project task. This has been resolved.
-	The "Violation of PRIMARY KEY constraint 'CSAnswers_PK'" error message occurred during the upgrade of a particular MYOB Advanced instance to 2017.1. This has been resolved.
-	A user account could not be created for an employee on the Employee form (EP.20.30.00) if this user account had been deleted earlier on the Users form (SM.20.10.10). This has been resolved.
-	Contacts could not be imported during synchronisation with Microsoft Exchange server if a contact display name was empty. This has been resolved.
-	During synchronisation with Microsoft Exchange server, some fields could be empty when they come to MYOB Advanced (for example, the CompleteName of a contact), which could cause an error message. These empty fields are now processed correctly.
-	Filters did not work on generic inquiry forms. This has been resolved.
-	When a user tried to export a help article to Microsoft Word, the "Object Reference not set" error message was displayed. This has been resolved.
-	When a user tried to sort by using the **Business Account Name** element in the Business Accounts generic inquiry form (CR.30.30.PL), the Cannot navigate to the record... error message was displayed.
-	The @ReportDescr column set parameter, which allows the report description to be displayed in the column set header, has been added to reports.
-	The SearchTextMark CSS class can now be used to customise the highlighting style for search text.
-	If a column set of the ARM report used a percentage format like P for a calculated column, this column was displayed incorrectly after the report was exported to Microsoft Excel. This has been resolved.

Problem ID	Description
-	Sometimes a user could not clear the Sync Account check box on the Exchange Server Configuration form (SM.20.40.15). This has been resolved.
-	An error message occurred during a snapshot creation on the Companies form (SM.20.35.20) if any snapshot in the MYOB Advanced database contained the NULL value in the LinkedCompany field. A workaround is available: The NULL value of the LinkedCompany field should be replaced with a CompanyID.
-	When a user tried to create a chart widget on a dashboard that was based on the Account Summary form (GL.40.10.00) an error message occurred. This has been resolved.
-	The process that had been run on the Validate Inventory form (IN.50.50.00) with the **Replan Back Orders** check box selected consumed all available memory and unloaded the IIS process if at least several thousands of records were selected for the processing. This has been resolved.
-	The Wiki Articles by Status report (SM.65.25.00) displayed no data. This has been resolved.
-	When a user selected the **Contact** check box on the Log Activity group of elements of the Outlook Plugin form and then went to the **Entity** box and pressed F3, the list of cases was displayed (where nothing should be displayed in this box). This has been resolved.
-	Searching for a customer by using MainContact.Email through the Contract-Based API generated a large number of SQL queries (more than 2000). This has been resolved.
-	If parent (first company) and a child (second company) companies contained the same deleted record, an error occurred when a user created a snapshot of a third company that was a child company of the second company on the Companies form (SM.20.35.20). This has been resolved.
-	Emails sent through the Mass Emails form (CR.30.80.00) were missing any previously attached files. This has been resolved.
-	The names of the files attached to notifications did not conform to the specified format of export file names. This has been resolved.
-	If the page header section of a report contained a reference to the data field in which no data item had been specified, the Null Reference error was displayed. This has been resolved; the valid error message is displayed.
-	It was not possible to use the @myworktree and @mygroups variables as the values of the generic inquiry conditions. This has been resolved.
-	Many strings used on the dashboards could not be collected and translated. This has been resolved.
-	In a multi-company MYOB Advanced configuration, the WSDL link was generated with errors when a user clicked the **View Endpoint Service** button on the Web Services Endpoint form (SM.20.70.60). This has been resolved.
-	When accessing generic inquiries that have default parameters through OData, these parameters were filled with the NULL values instead of the default values. This has been resolved.
-	Unicode characters could not be used in report parameters. This has been resolved.

Problem ID	Description
-	Snapshots became corrupted during creation if any non-ASCII symbols were stored in table columns that had been declared as char. This has been resolved.
-	An ARM report could display the wrong data because of an incorrect search algorithm for unit sets included in a formula. This has been resolved.
-	Not all UI fields were available for mass updating on the Mass Update Fields tab of the Generic Inquiry form (SM.20.80.00). This has been resolved.
-	When a user searched for some data in reports by using the search box (located at the upper right corner of a report form), and the found text was highlighted by a hyperlink in the report, this link did not work. This has been resolved.
-	The values that had been specified for inquiry parameters in a dashboard widget got copied to other widgets on this dashboard that used the same inquiry. This has been resolved.
-	The information from an original document was not copied to the Document Templates form (SM.20.90.20) after a user selected the **Save as Template...** action in the Clipboard toolbar button on the Invoices and Memos (AR.30.10.00) and Bills and Adjustments (AP.30.10.00) forms. This meant that the document template was not created. This has been resolved.
-	When a user created a dashboard widget for a generic inquiry that had some aggregate function defined on the Results Grid tab of the Generic Inquiry form (SM.20.80.00), an error occurred. This has been resolved.
-	In the detail lines of data entry forms, the tabs between cells suddenly scrolled to top of a form when a user selected checkboxes or entered numbers. This has been resolved.
-	When using OData, the following data could not be loaded from the built-in generic Inquiries: BI-Opportunities, BI-Customers, BI-Employees. This has been resolved.
-	The NullReferenceException occured in the CalculatePackages function when a client application tried to add a shipment for a product on the date earlier than the requested date. This has been resolved.
-	When a user tried to add a new bound field to the transactions grid of the Journal Vouchers form (GL.30.40.00) by using the customisation project, a null reference exception error occurred. This has been resolved.
-	The wrong cache was used in notification templates if emails were send by using the Email Dunning Letters action; the cache that had been used in the mail subject was used in the mail body. This has been resolved.
-	The "Arithmetic overflow error converting expression to data type int" error occurred when a user created a generic inquiry with the BAccount, Customer, Vendor, or EPEmployee table, and grouping. This has been resolved.
-	When a user applied a quick search on a generic inquiry form, the list of records was filtered incorrectly. This has been resolved.
-	On the Description tab of the Stock Items form (IN.20.25.00), it was not possible to insert a table. This has been resolved.
-	If an invalid value had been uploaded from an Excel file to a grid on a form, the value disappeared with any update of the grid. This has been resolved.
-	An empty section was not transferred from a subreport to a report because of incorrect order of the sections. This has been resolved.

Problem ID	Description
-	For a user whose account had not been activated, the system displayed the message "Invalid Credentials. Please try again." instead of the message "Your account is not activated yet, please contact the system administrator". This has been resolved.
-	The generic inquiry tabs provided information from the other MYOB Advanced entities. This has been resolved.
-	If a generic inquiry was sorted by a field from a non-primary joined DAC, navigation to and from an entry form did not work properly. This has been resolved.
-	Fields that were derived from a base DAC did not follow the key-specific value translation, which was specified for the parent. This has been resolved.
-	The time of scheduled process execution may be shifted by one minute sporadically. This has been resolved.
-	If a user specified a postal code mask for a country on the Countries/States form (CS.20.40.00), then, on the Customers form (AR.30.30.00), the input mask in the **Postal Code** box was generated incorrectly in some cases. The system used the postal code mask from the settings of the country of the current branch instead of using the country of the selected customer. This has been resolved.
-	When a user was navigating to any record on the Order Types form (SO.20.10.00) the error message "Invalid column name 'descr'." was generated on the database side due to an extension table declared for the SOOrderType DAC. This has been resolved.
-	Users of the MYOB Advanced mobile application could not use attachments functionality, because the REST API returned a schema with an incorrect MIME for attachment types. This has been resolved.
-	Users could lose access to some dashboard widgets after opening the Dashboards form (SM.20.86.00) by clicking the **Properties** button on the dashboard toolbar, editing the dashboard properties, and returning to the dashboard. This has been resolved.
-	Users could not enter and save values in the **Caption** box of the Widget Properties dialog box if multi-language support was set up. A widget caption could be filled in in the Translations dialog box only. This has been resolved.
-	After a user clicked Restore Snapshot on the Companies form (SM.20.35.20) for any snapshot, the list of snapshots was cleared and all snapshots became orphaned (i.e. not connected to any company). Also, the snapshot restoration history was cleared. This has been resolved.
-	Generic Inquiries did not show records on a list correctly with page numbering enabled after navigation to any record entity, and then going back to the list. This has been resolved.
-	Table borders in reports appeared misaligned in HTML format. This has been resolved.
-	Generic inquiries with page numbering enabled displayed the same data on every page. This has been resolved.
-	The Notification lookup box on the Notification Templates form (SM.20.40.03) could contain duplicate entries. This has been resolved; the primary key for the Notification table has been changed from CompanyNotificationID to NotificationID.
-	The expand button for expanding the list of available modules could disappear if the size of the browser window was too small or zoom too high. This has been resolved.

Problem ID	Description
-	The contract-based API did not handle detail objects according to the order of control containers in ASPX. This has been resolved.
-	On the Attributes tab of the Stock Items form (IN.20.25.00), uploaded images were not displayed in the Image area. This has been resolved.
-	The error "An unhandled exception has occurred in function 'MoveNext'. Please see the trace log for more details." occured when a user generated DAC for non-existing DB table in Customisation Manager. This has been resolved.
-	When a user clicked the **View On Map** button on the Contacts form (CR.30.20.00), an incorrect URL opened if the address contained accented characters. This has been resolved.
-	The selfAssociate parameter in the ExternalAuth section of the web.config did not work. The system automatically associated users by using their email, so any user with enabled OAuth and an associated email address could be used to log in instead of the system prompting the user whose account should be associated. This has been resolved.
-	The "406 Not Acceptable" error occurred instead of "403 Forbidden" if users didn't have access rights for the underlying generic inquiry when accessing OData. This has been resolved.
-	The "Incremental - New Only" sync type of import scenarios did not work for the SQL data provider. This has been resolved.
-	On the Convert Purchases to Assets form (FA.50.45.00), if a user decreased the height of the upper table, the navigation buttons located below the table became hidden and unavailable In the Google Chrome browser. This has been resolved.
-	An error occurred when a user tried to attach a file to a wiki article. This has been resolved.
-	Generic inquiries that included an underscore in the **Alias** column on the Tables tab of the Generic Inquiry form (SM.20.80.00) were not working via OData. This has been resolved.
-	Contract-Based API: On the Web Service Endpoints form (SM.20.70.60), if a user added an object to an endpoint's entity to which several fields had been added but not saved one by one on the Fields tab, these fields were duplicated to the object's Fields tab. Once the object was saved, another duplicated object appeared on the tree in addition to this one. A user could not delete any of these duplicated objects from the tree. This has been resolved.
-	On the Companies form (SM.20.35.20), an error message appeared when a user restored a snapshot when there were tables without primary keys or unique indexes in the database. This has been resolved.
-	The system could hang when trying to return errors when working on large datasets. This has been resolved.
-	It was not possible to filter a field in generic inquiry with applied grouping by formula. This has been resolved.
-	On the Email Activity form (CR.30.60.15), a URL could disappear from the message body after a user specified any setting in the Summary area of the form. This has been resolved.
-	When using the Google Chrome browser, in the Files dialog box, after a user had attached a file with a non-standard extension, the data in the file was lost. This has been resolved.

Problem ID	Description
-	On the File Maintenance form (SM.20.25.10), the size of files that were saved in a local folder or on Azure Blob storage was displayed as 0. This has been resolved.
-	The **Disable Input Autosuggestion** check box has been added to the User Profile form (SM.20.30.10). A user selects this check box to stop the system from displaying a drop-down list with suggestions (for lookup boxes that support autocomplete) when the user is typing text.
-	A search box has been added to the Formula Editor dialog box that provides the capability to search for text in the Component Selection pane. The search function reduces the time for finding a required object when the list of objects displayed in the pane is very long.
-	An **Export Only Mapped Fields** check box has been added to the Export Scenarios form (SM.20.70.25), which indicates (if selected) that only the fields that are mapped in the export scenario should appear in the output of data export; other fields of the data provider are skipped during export. This check box should be selected when data is exported to external systems, such as HubSpot, and the values of fields that are not mapped in the scenario should not be rewritten with null values.

Documentation

Problem ID	Description
-	The User Security chapter in the User Guide has been restructured. All how-to topics have been reviewed and updated.
-	The Accounts Receivable chapter in the User Guide has been reviewed. The Managing Invoices and Memos and Managing Payments chapters have been replaced with the following chapters: Processing AR Documents, Processing Invoices, Processing Payments and Applications, and Processing CC Payments.
-	The overdue charges process description was refactored: The result of the calculation process is explained, and a table has been added with possible configurations of an overdue charge code.
-	The navigation of a wiki page has been enhanced with the addition of the Back To Top link.
-	The Managing Self-Service Portal Wikis chapter in the User Guide has been reviewed and updated to better reflect the tasks of the Self-Service Portal administrator.
-	The System Requirements topic in the Installation Guide has been updated and rearranged.
-	The MYOB Advanced Customisation Guide has been completely rewritten. The new version of the guide contains a lot more information and can be used as a reference book.
-	The Getting Started part has been added to the MYOB Advanced User Guide. In this part, various tools of personalising MYOB Advanced and system-wide actions are described.

Known Issues

The following known issues and breaking changes have been identified in this release.

Unable to upload a portal logo image

It is not currently possible to upload a Portal Logo image on the Portal Preferences form (SP.80.00.00)—the error message "ImageUploader is not defined" appears when attempting to do so. This error does not prevent any other settings on the form from being changed; it is still possible to make other edits and save after dismissing the error message.

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)