MYOB Advanced

Release Notes

2017.1.9

Contents

Introduction

Welcome to the 2017.1.9 release of MYOB Advanced.

What's New in this Release?

The 2017.1.9 release adds support for the MOYB Advanced add-in for Microsoft Outlook. It also adds functionality and new reports to the payroll module, and addresses issues identified in previous versions.

Installing this Release

The 2017.1.9 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.

New Features

Outlook Add-in

This release adds support for the MYOB Advanced add-in for Outlook, which connects Microsoft Outlook to your MYOB Advanced system, so that you can associate emails and contacts with records in Advanced.

You can download the add-in from the User Profile form in Advanced, then install it in Outlook. The Outlook add-in for Advanced works in both the local desktop version of Outlook and the online Office 365 Outlook.

> **Note:** To use the Outlook add-in, the "Exchange Integration" feature must be enabled on the Enable/Disable Features form (CS.10.00.00).

Selecting an email, then clicking the MYOB Advanced button, opens a pane on the right of the interface, which lets you add the sender of the email as a Lead or a Contact in the MYOB Advanced system. If a record for the sender already exists, you can open Advanced to view their details and the details of the Business Account that they're associated with.
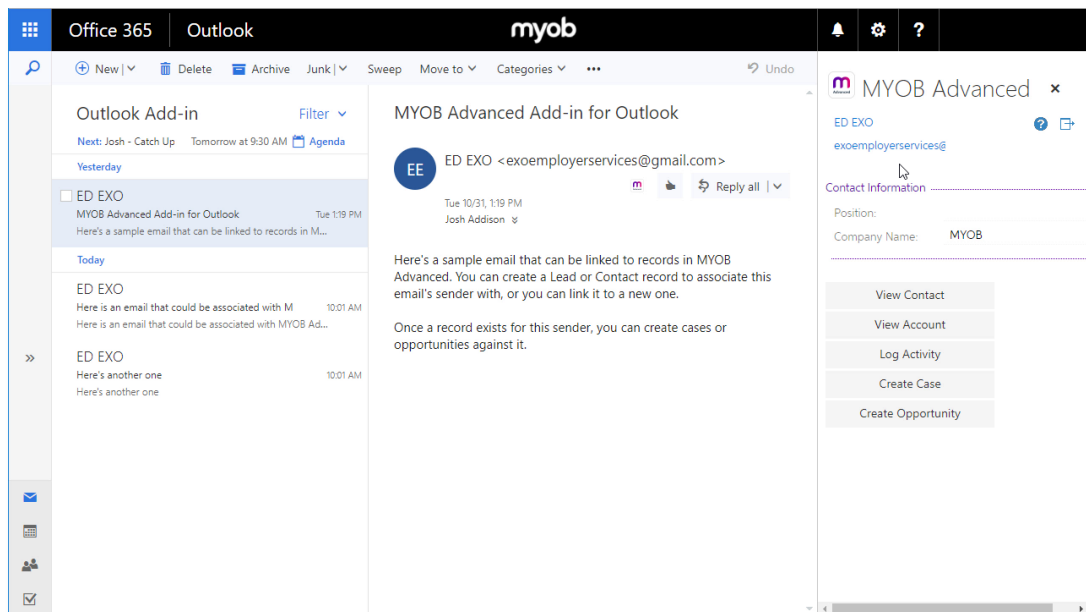
You can create Cases and Opportunities for your contacts from within in Outlook, and then open them in Advanced as well.

The **Log Activity** function lets you record the email itself against a record in MYOB Advanced, where it will appear on the record's Activities tab. By recording email activities in Advanced, you can ensure that the communication chain for the record is preserved, and you can reply to the email directly from within the Advanced interface.

Installing the Outlook Add-in

To install the MYOB Advanced add-in for Outlook:

1. Ensure the "Exchange Integration" feature is enabled on the Enable/Disable Features form (CS.10.00.00).

2. Go to the User Profile for the logged-in user (click on their name in the top right and select **User Profile** from the dropdown).

3. Select the Email Settings tab and click the **Download Outlook Add-In Manifest** hyperlink called to download the manifest XML file.

4. Go to your Office 365 account in a web browser. Once logged in, click on the Settings icon and select **Manage connectors** from the Settings pane.

5. Select on the Add-Ins and click the **Click here to add a custom add-in**' link at the top of the tab. Select **Add from file**.

6. Browse to the manifest file that you downloaded earlier and click **Open**. You should now be able to see MYOB Advanced as an option in the My add-ins category.

Payroll Updates

Entitlement Transfer

This release adds an Entitlement Transfer form (MP.PP.30.01) to the Payroll module. This form lets you transfer an employee's entitlement balances from one entitlement to another, or between the Accrual and Earned balances of the same entitlement.

> **Note:** You can only transfer between entitlements that have the same type of units, e.g. you cannot transfer between an entitlement valued in Hours and one valued in Dollars.

You may need to transfer entitlement balances if, for example, an employee who was earning four weeks Annual Leave per year, negotiated an increase to five weeks—in this case, the balance would need to be transferred from the four-week entitlement into the new five-week entitlement. When terminating an employee, the system can process only one entitlement for each leave type; if an employee has more than one Annual Leave entitlement, for example, you will need to transfer the balance of one to the other before the termination can be processed.

In previous versions, it would have been possible to do this on the Entitlement Adjustment form (MP.PP.30.01), but it would require two adjustments, and you would need to note down the transfer details manually in between adjustments. With the new form, you can perform the transfer in a single operation.

On the Entitlement Transfer form, select the employee whose balances you want to transfer and specify an adjustment date—this is the effective date for the displayed balances, and for the transfer.

> **Note:** A future date can be set, which will be used for the transfer, but the displayed balances will not anticipate accruals.

Select the entitlements to transfer to and from (these can be the same entitlement) and the Accrual and Earned balances will be displayed:

Enter the amount(s) to transfer, then click the Save button to perform the transfer. The employee's accrual and entitlement amounts are transferred separately; each transfer will result in a separate entry on the Entitlement History form (MP.PP.44.00).

New Payroll Reports

This release adds the following new reports to the Payroll module:

Pay Reports

- Pay Run Details (MP.PP.60.21) – Shows details of all employee's pays in a selected pay run.

- Payslip Details (MP.PP.60.80) – Displays the payslip for a selected pay run and employee.

  > **Note:** This report provides quick access to payslip details for administrators. It should <u>not</u> be distributed to employees—the payslips for each employee in a pay run can be opened from the Pay Run Details form (MP.PP.31.20).

- Pay GL Batch Summary (MP.PP.60.40) – Shows an overview of all GL batches posted for a selected pay between selected Physical Pay Dates.

- Pay GL Batch Details (MP.PP.60.41) – Shows details of all GL transactions in the batches posted for a selected pay and branch between selected Physical Pay Dates.

- Payroll Payment Distribution Schedule (MP.PP.60.70) – Shows all employees' pay distribution details for a selected pay run.

Entitlement Reports

- Entitlement Summary (MP.PP.60.30) – Shows a summary of all entitlement accruals for a selected pay run, or the accruals for one employee in the pay run.

- Entitlement Details (MP.PP.60.31) – Shows details of employees' entitlement transactions between selected Physical Pay Dates. Options are available to filter the report by department, pay group, employee and branch.

Resolved Issues

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

Problem ID	Description
Payroll	
150711996199 150425030161	Manual adjustments entered for an employee as well as the Opening Accrual Balance entries were not appearing on the Entitlement History form (MP.PP.44.00). This has been resolved.
149862500406 149543305211	Fund verification errors could appear when attempting to submit superannuation batch files that included SMSFs using the MYOB Pay Super service. This has been resolved.
151194405019	TFN Declaration submissions were blocked; this has been resolved.
System and Platform	
147924048587 147738148491	The error message "The email account is empty." could appear when attempting to email a Purchase Order. This has been resolved.
140666854734 140644290921	This release adds support for the MYOB Advanced add-in for Outlook—see page 2.

Known Issues

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

Partner users visible on some forms

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

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