

Major Release Highlights

# MYOB Advanced 2022.2 (Autumn Release)

**myob**

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## SUMMARY

MYOB Advanced 2022.2 introduces a range of exciting new features which enhances the overall user experience and adds additional functionality to a wealth of existing features. This document showcases some of the highlights that are contained in the full release notes, which can be found in the links below. ***We encourage everyone to review the full release notes document in conjunction with this document.***

Full release notes can be downloaded from MYOB's Education Centre:

[Release Notes for MYOB Advanced 2022.2](#)

Stand-Out Features:

- Single Sign On (SSO) with Microsoft Azure AD
- Approvals for GL Transactions
- Dunning Letter Enhancements
- Export the Batch Payment before Releasing
- Side-Panels & Dashboards for Inventory and Order Management
- Inventory Turnover Inquiry
- Sales Order Relations to other Entities
- Engineering Workbench in Manufacturing
- Side-Panels for Manufacturing
- Tracking Project Progress by Unit
- Built In InfoTips

Document Version 1.0

### 1. Commerce

#### Connection of a Store with a Custom Shopify App

In January 2022, Shopify deprecated support for the private apps and introduced custom apps, which can now be used to connect a Shopify store to MYOB Advanced.

#### Export of Sales Orders to Shopify

Starting in MYOB Advanced 2022.2, an administrative user can set up the order export so that if a sales order has been created in MYOB Advanced, it can be exported to a Shopify store, and if a user changes a sales order that has already been exported, these changes can be synchronised with Shopify.

#### Enhanced Export of Product Availability Settings

In MYOB Advanced 2022.2, a number of improvements have been introduced for the export of product availability settings to BigCommerce and Shopify stores.

#### Multiple Guest Customer Accounts

Starting in MYOB Advanced 2022.2, an administrator can set up the system to use multiple guest customer accounts to record guest sales orders imported from BigCommerce or Shopify.

### 2. CRM

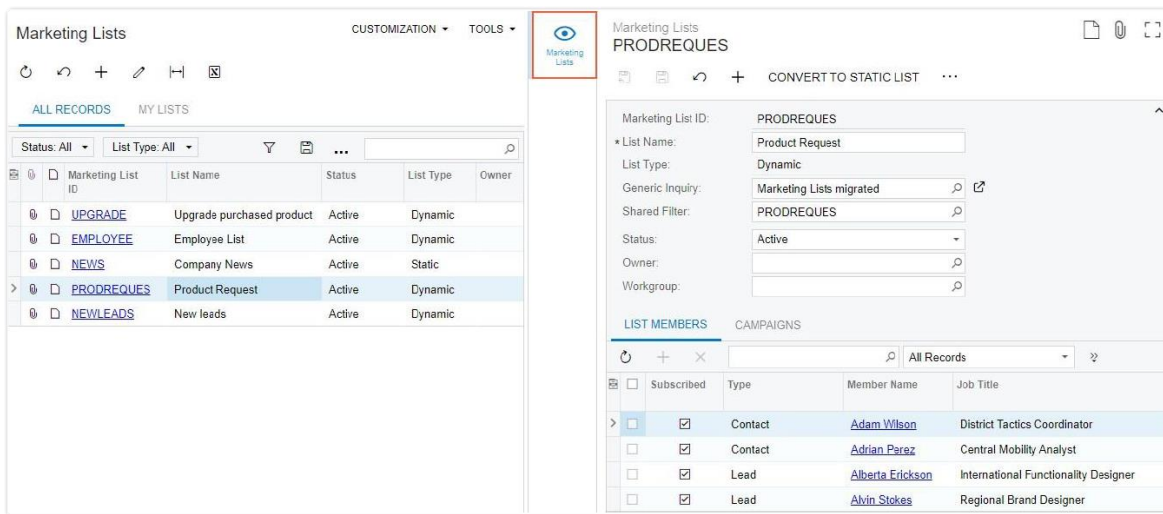
#### Enhanced Marketing Lists and Campaigns

In MYOB Advanced 2022.2, users can add multiple members to marketing lists and campaigns, and manage the members and subscriptions quickly and easily. The following enhancements has been made:

- New Layout of the Marketing Lists Form
- Enhancements to Static and Dynamic Marketing Lists
- Addition of New Members to a Static Marketing List
- Enhanced Subscription Management
- Copying of Members Between Marketing Lists
- Improved Layout of the Marketing Campaigns Form
- Subscription Management for a Particular Lead, Contact, or Business Account
- Minor Enhancements to the Leads, Contacts, and Business Accounts Forms

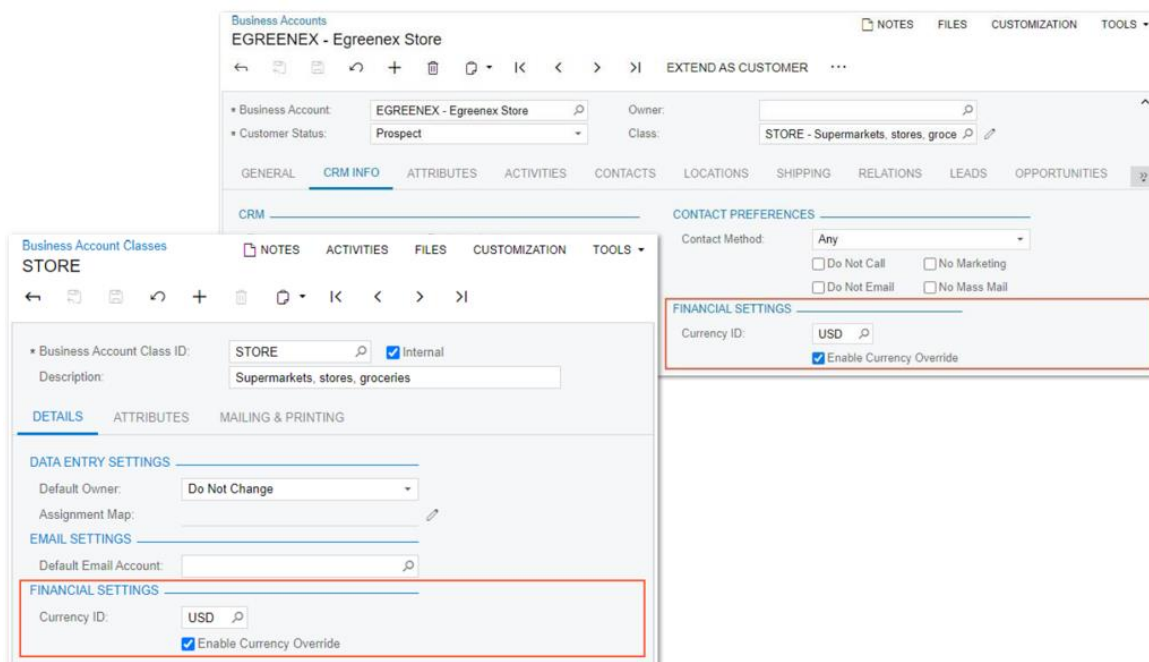
### Side Panels with Marketing Data for CRM Entities

In MYOB Advanced 2022.2, a side panel has been added to the lists of marketing campaigns and marketing lists, and a tab has been added to the side panels of the lists of business accounts and contacts. These side panels give a user the ability to view the list of records while simultaneously viewing (and modifying, if necessary) various information related to any record selected in the list. An example of one of the side-panels shown below.



### The Currency of Business Accounts and Related Entities

In MYOB Advanced 2022.2, users can select a currency for a business account class and a particular business account. If a business account is extended to be a customer, the currency is synchronised between the business account and the associated customer. Also, the default currency of an opportunity or sales quote is affected by the business account specified for it.



### The Ability to Change the Business Account in Opportunities and Sales Quotes

In MYOB Advanced 2022.2, users can change a business account in an opportunity or a sales quote, even if the opportunity or the sales quote has rows added on the Details tab of the Opportunities (CR304000) or Sales Quotes (CR304500) form.

### The Ability to have multiple Business Account for different Sales Quotes linked to the same Opportunity

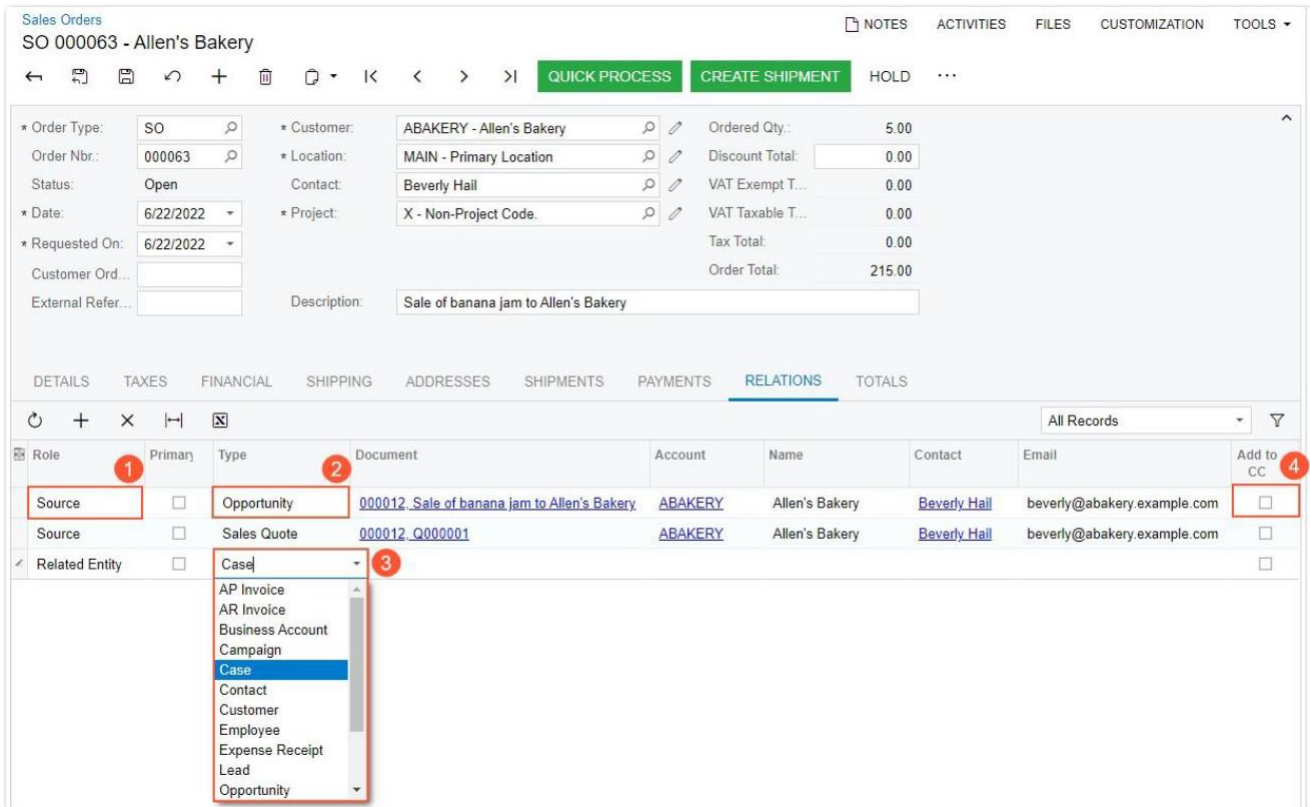
Starting in MYOB Advanced 2022.2, if an opportunity has multiple sales quotes on the Sales Quotes (CR304500) form, an opportunity can have multiple sales quotes whose business accounts differ from the business account specified for the opportunity on the Opportunities (CR304000) form. See release notes for certain restrictions.

Primary	Quote Nbr.	Type	Business Account	Location	Contact	*Description	Status
<input type="checkbox"/>	Q000014	Sales Quote	AACUSTOMER	MAIN	Amelia Armstrong	Widget Opportunity for Alta Ace	Draft
<input checked="" type="checkbox"/>	Q000015	Sales Quote	AACUSTOMER	MAIN	Amelia Armstrong	Widget Opportunity for Alta Ace	Draft
<input type="checkbox"/>	Q000016	Sales Quote	ABCHOLDING	MAIN	Eva Lawrence	Widget Opportunity for ABC Holdings	Draft
<input type="checkbox"/>	Q000017	Sales Quote	ABCVENTURE	MAIN	Ray Newman	Widget Opportunity for ABC Capital	Draft

### Relations Between Sales Orders and Associated Entities

MYOB Advanced 2022.2 introduces the ability to track and manage bidirectional relations between a sales order, an opportunity, and a sales quote. Also, a user can track one-way relations between a sales order and a variety of records associated with it.

On the Sales Orders (SO301000) form, a new Relations tab has been added, and it shows the relations between the selected sales order and other entities like an opportunity, sales quote, case, etc. The Relation sections has been added to the MYOB Advanced Mobile App as well.



### 3. Email Processing

#### Support of OAuth 2.0 for Google Suite

To mitigate the possibility of access being turned off for less secure apps (LSAs) to Google Suite, MYOB Advanced 2022.2 provides support for OAuth 2.0 authentication for IMAP, POP3, and SMTP protocols.

We recommend that customers change their settings to the OAuth2 method if they have configured email processing for Google services by using the username and password authentication method.

#### Email Template Enhancements

MYOB Advanced 2022.2, the following enhancements has been made:

- Notification Templates (SM204003) form has been renamed to Email Templates.
- The lookup table (within Email Templates) used to specify the placeholders of email recipients has also been redesigned.
- Support for the use of templates in mass emails has been added. In earlier versions of MYOB Advanced, templates could only be only for an email activity.



### 4. Field Services

#### Appointment Schedule Optimisation with Consideration of the Staff Members' Skills

Starting in MYOB Advanced 2022.2, the appointment scheduling optimisation functionality has been enhanced so that the system considers a staff member's skills when assigning staff members to appointments.

#### Improved Titles Related to Total Amounts on the Service Orders and Appointments Forms

In the previous versions of MYOB Advanced, on the Service Orders and Appointments forms, there were inconsistencies in the names of the UI elements related to total amounts as well as in the logic in the naming of those elements. In MYOB Advanced 2022.2, these names have been revised and optimised.

#### Report Improvements

The Service Order Summary (FS651000) and Appointment Summary (FS652500) reports have been enhanced.

#### Profit Margin Calculation

In MYOB Advanced 2022.2, in addition to the profit markup, the profit margin is calculated for a service order and appointment. On the Totals and Profitability tabs of the Service Orders and Appointments forms, the new Profit Markup (%) and Profit Margin (%) fields have been added.

#### Improvements in the Mobile App

Because some of the UI elements have been revised and renamed on the Appointments (FS300200) form in MYOB Advanced 2022.2, the similar UI elements have also been renamed on the Appointments screen of the MYOB mobile app for consistency.

#### Updating the Unit Cost of Non-Stock Items to Be Purchased

Non-Stock Item or Service type Items added to a service order and an appointment, had the item's default unit cost inserted on the order. If the item is purchased the unit cost may be changed in the associated purchase order or AP bill. In previous versions of MYOB Advanced, the default unit cost in the service documents was not updated in this case.

In MYOB Advanced 2022.2, if the unit cost of an item has been updated in the purchase order or AP bill associated with a service document, the system updates the Unit Cost value for the corresponding line item in the service document.

Further Enhancements to Unit Costs:

- Ability to Edit the Unit Cost Column
- Recalculation of Amounts That Use the Unit Cost (All totals and profit/margin fields are recalculated)

### 5. Finance

#### AP Debit Adjustments with Retainage

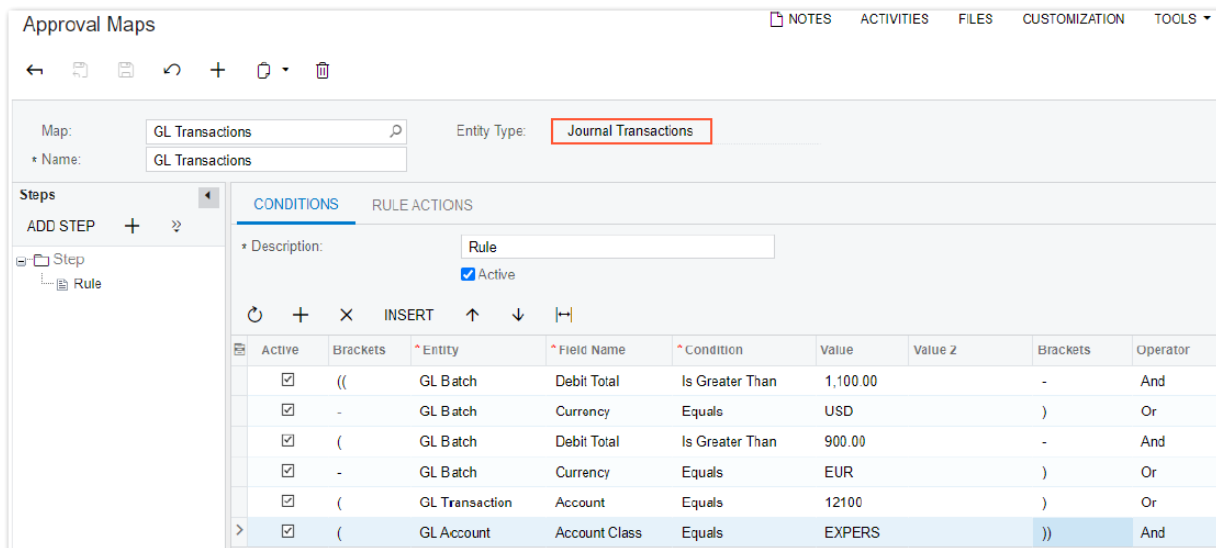
In previous versions of MYOB Advanced, users could not manually create AP debit adjustments with retainage if a small correction of an AP bill with retainage was required. Starting in MYOB Advanced 2022.2, various options have been added for creating AP Debit Adjustments. See full release notes for details.

Changes to various screens to accommodate the AP Debit Adjustment with Retainage changes:

- New setting on the Accounts Payable Preferences Form (AP101000)
- Changes to the Bills and Adjustments Form (AP301000)
- Changes to the Release AP Retainage Form (AP510000)
- Changes to the Cheques and Payments Form (AP302000)
- Changes to the Prepare Payments Form (AP503000)
- Changes in Calculation of Amounts in Reports and Forms (See detailed release notes for all report affected)

#### Approval of GL Transactions

Starting in 2022.2, MYOB Advanced makes it possible to release and post GL transactions only after they have been approved by an authorised employee. On the Approval Maps Form, a new Entity Type has been added.



Changes to the following sections to accommodate the GL Transaction Approvals:

- New Email Template (formally known as Notification Template)
- Changes to the General Ledger Preferences Form – Added a new Approval Tab.
- Changes to the Journal Transactions Form – Added buttons for Approve/Reject.
- Changes to the Manage Financial Periods Form - Transactions with the Pending Approval status will prevent the system from closing a selected period.
- Approval of GL Transactions included in the MYOB Advanced Mobile App.

### Automatic Assignment of the Tax Zone to Sales Orders and Invoices

In previous versions of MYOB Advanced, when a sales document (a sales order or an SO invoice) was created, the tax zone for the document was copied from customer location settings on the Customer Locations (AR303020) form. If no tax zone was specified for the customer location, the system searched for a tax zone for which the needed postal code was specified on the Zip Codes tab of the Tax Zones (TX206000) form. On this tab, it was not possible to specify a range of postal codes.

In MYOB Advanced 2022.2, enhancements were made for adding multiple ship to details. The Zip Codes tab has also been renamed to Ship-To Addresses.

### Dunning Level by Customer Class

In MYOB Advanced 2022.2, dunning levels can now be specified for specific customer classes. For example, different dunning processes can be required for business-to-business (B2B) customers and business-to-consumer (B2C) customers.

Dunning Letter Level	Days Past Due	Days to Settle	Description	Dunning Fee
1	30	3	30 Days	0.00
2	60	3	60 Days	0.00

Customer Class	Customer	Customer Name	Earliest Due Date	Branch	Overdue Balance	Number of Overdue Documents	Customer Balance	Number of Documents	Dunning Letter Level	Last Dunning Letter Date
<input checked="" type="checkbox"/>	INTLEU	CARIBBEAN	Caribbean Secretary Online	3/2/2022	PRODWHOLE	43,971.98	2	43,971.98	2	1
<input type="checkbox"/>	INTLCA	VANCOUVER	Vancouver Supplies	3/30/2022	PRODWHOLE	7,840.00	1	7,840.00	1	1
<input type="checkbox"/>	INTL	WATERPROC	CHENGDU RONGYI WATER PROCESSING	3/2/2022	PRODWHOLE	43,550.00	2	43,550.00	2	1

### Exclusion of Payments and Voided Payments from Open Item Statements

In previous versions of MYOB Advanced, when a customer statement was generated, the document balances were calculated based on the document applications on the statement date. If a document with an open balance, such as a payment, was voided, it was still shown on the customer statement, even if the customer's statement type was Open Item.

Starting in MYOB Advanced 2022.2, the logic of generating customer statements with the Open Item type has been modified so that the documents closed before or on the statement date are not included in the customer statement.

### Inclusion of All Documents with Open Balances in Dunning Letters

In previous versions of MYOB Advanced, dunning letters included only invoices and debit memos with open balances. Other documents with open balances, such as credit memos and payments, were not included in dunning letters. Consequently, dunning letters did not accurately reflect customers' balances for a specific date.

Starting in MYOB Advanced 2022.2, users can now include Open credit memos, payments, prepayments, and customer refunds.

### Improved Processing of Batch Payments

In previous versions of MYOB Advanced, after the release of a batch payment, the batch could be exported to a file that would be sent to a bank. As a result, if the bank rejected one payment in the batch, a user had to void all payments in the batch, create new payments again, and create a new batch of payments that excludes the rejected payment.

Starting in MYOB Advanced 2022.2, the following improvements have been made to ease the processing of batch payments:

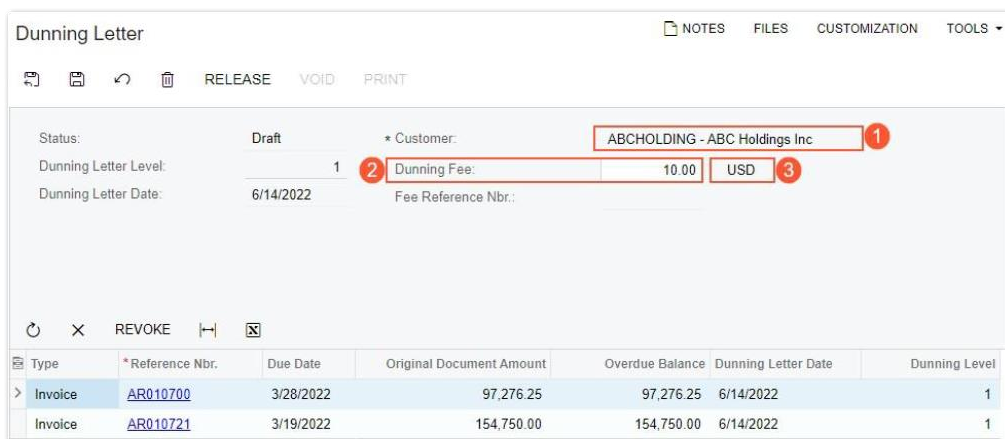
- A batch can be exported (ABA File) before releasing the Batch Payment.
- An exported batch can be corrected so that incorrect payments can be excluded from the batch.
- Suppliers' payment details can be changed, and a batch can be re-exported.
- A batch payment can be cancelled, and all released payments in the batch can be voided at once.
- A released batch payment can be voided, which causes all the payments in the batch to be voided at once.
- Payments can be added to an existing batch.

### Improvements in the Straight-Line Depreciation Method

Starting in MYOB Advanced 2022.2, the logic for calculating depreciation by using the Straight-Line calculation method and the Full Day averaging convention has been reimplemented by using a new depreciation engine.

### Modification of Dunning Fees During the Dunning Process

Starting in MYOB Advanced 2022.2, the dunning process has been improved to allow more flexibility for users. Users can now review the documents included in dunning letters and dunning fees before they prepare and release a dunning letter. Specific documents can be excluded from the dunning letter, and the dunning fee amount can be modified.



Type	*Reference Nbr.	Due Date	Original Document Amount	Overdue Balance	Dunning Letter Date	Dunning Level
> Invoice	AR010700	3/28/2022	97,276.25	97,276.25	6/14/2022	1
Invoice	AR010721	3/19/2022	154,750.00	154,750.00	6/14/2022	1

### Preventing Creation of Documents with Dates in the Distant Future

Starting in MYOB Advanced 2022.2, the validation of dates has been implemented. On data entry forms, the system will not allow users to enter dates that do not correspond to any financial period specified on the Master Financial Calendar (GL201000) form. This validation used to be there prior to 2019.1 but was removed due to the introduction on Multiple Calendar Support.

### Support of Multiple Base Currencies for Contracts

Starting in MYOB Advanced 2022.2, contracts can be created and processed for companies in the same tenant with different base currencies. A contract can be successfully billed, and an AR invoice can be created if the base currency of the contract's customer is the same as the base currency of the originating branch in the AR invoice.

### Support of Multiple Base Currencies for the Dunning Process

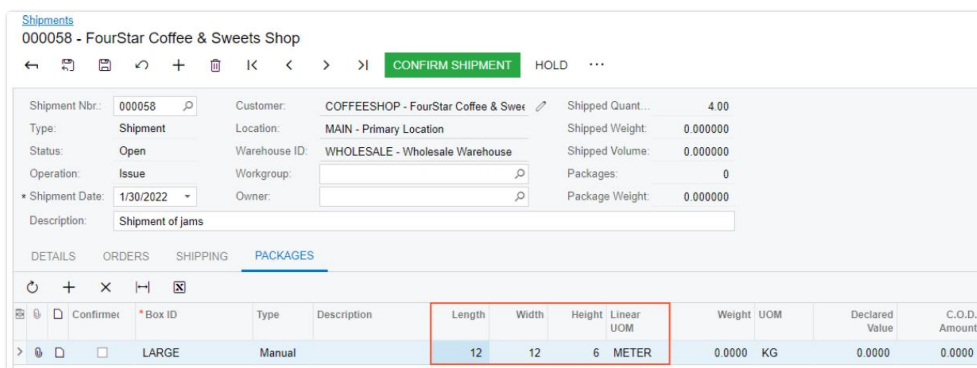
Starting in MYOB Advanced 2022.2, the dunning process can be used and invoices with dunning charges can be created if multiple companies with different base currencies are configured in the same tenant.

### 6. Inventory and Order Management

#### Ability to Change the Dimensions of the Box on the Fly

In previous versions of MYOB Advanced, users could not change the dimensions of boxes used for packing of items on the Shipments (SO302000) form. The only way one could perform this task was opening the Boxes (CS207600) form and changing the settings of an existing box or creating a new box.

In MYOB Advanced 2022.2, the ability to change box dimensions on the Shipments (SO302020) form has been introduced.



#### Calculation of Inventory Turnover

In previous versions of MYOB Advanced, a user could evaluate the efficiency of the inventory management by using the functionality of ABC codes and movement classes.

MYOB Advanced 2022.2 introduces the new Inventory Turnover (IN407010) inquiry form. By using this inquiry form, a user can calculate the stock item turnover, item average inventory for the selected period, and the average number of days (DSI) required to turn the average inventory into sales.

#### Conversion of the Stock Status of the Item

In MYOB Advanced 2022.2, the ability to convert stock items to non-stock items and visa-versa has been added. These new capabilities increase the versatility of item-related scenarios. A user can change the status of a specific item on the form where it was created or use a new mass-processing form to change the stock status of multiple items.

#### Selection of a Cost Layer Type for Inventory Transactions (Project Costs)

In earlier versions of MYOB Advanced, a separate cost centre for project costs was introduced. MYOB Advanced 2022.2 has expanded this functionality by adding the ability to select the type of the cost layer that will be affected by the release of inventory transactions. Note, only applicable if the 'Project-Specific Inventory' feature is enabled.

### Ability to Copy Header Notes and Attachments on Sales Orders to Shipments/Invoices

The following Copy Settings have been added to the Order Types:

- Copy Header Notes to Shipment
- Copy Header Attachments to Shipment
- Copy Header Notes to Invoice
- Copy Header Attachments to Invoice

### Side Panel Support for Inventory and Order Management

In MYOB Advanced 2022.2, a side panel has been added to various lists of records and data entry forms related to the inventory and order management functionality, which gives a user the ability to view the list of records while simultaneously viewing (and modifying, if necessary) various information related to any listed record or opened entity on a data entry form. Check the release notes for the full list of screens where side-panels have been added.

### Dashboards for Inventory and Order Management

In MYOB Advanced 2022.2, a variety of predefined dashboards have been implemented to give employees a window into the current state of the company's inventory, sales, and purchases. The following Predefined Dashboards by Job Duties have been added:

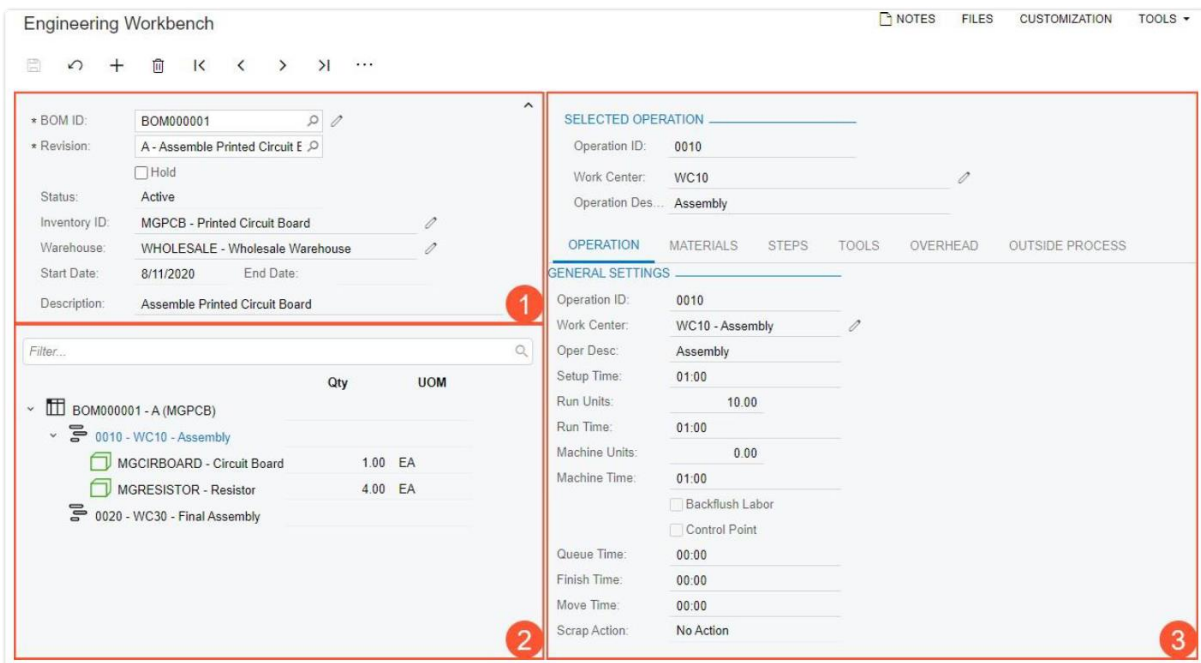
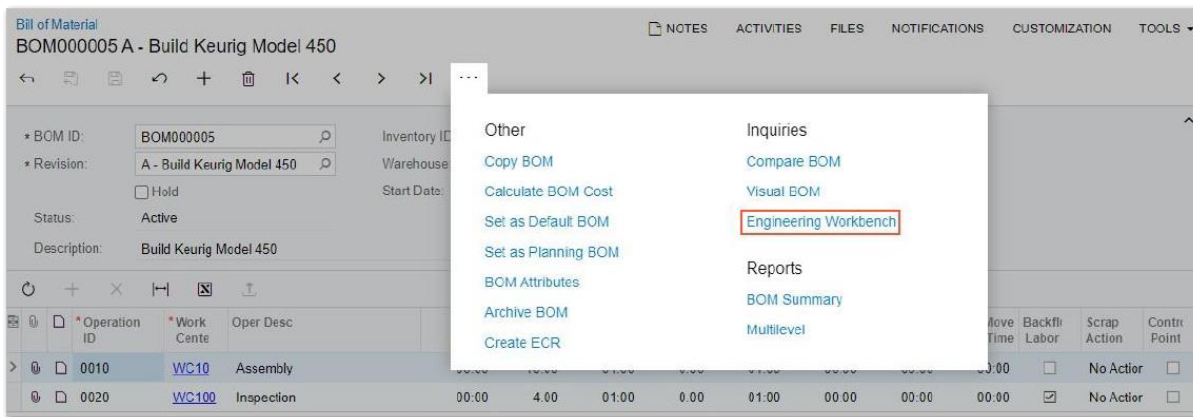
- Sales Manager
- Purchasing Manager
- Warehouse Manager
- Receiving Clerk
- Shipping Clerk



### 6. Manufacturing

#### Engineering Workbench

In MYOB Advanced Manufacturing Edition 2022.2, a manufacturing engineer can view, create, and modify a multilevel bill of material displayed in a tree structure by using the new Engineering Workbench (AM208100) form.

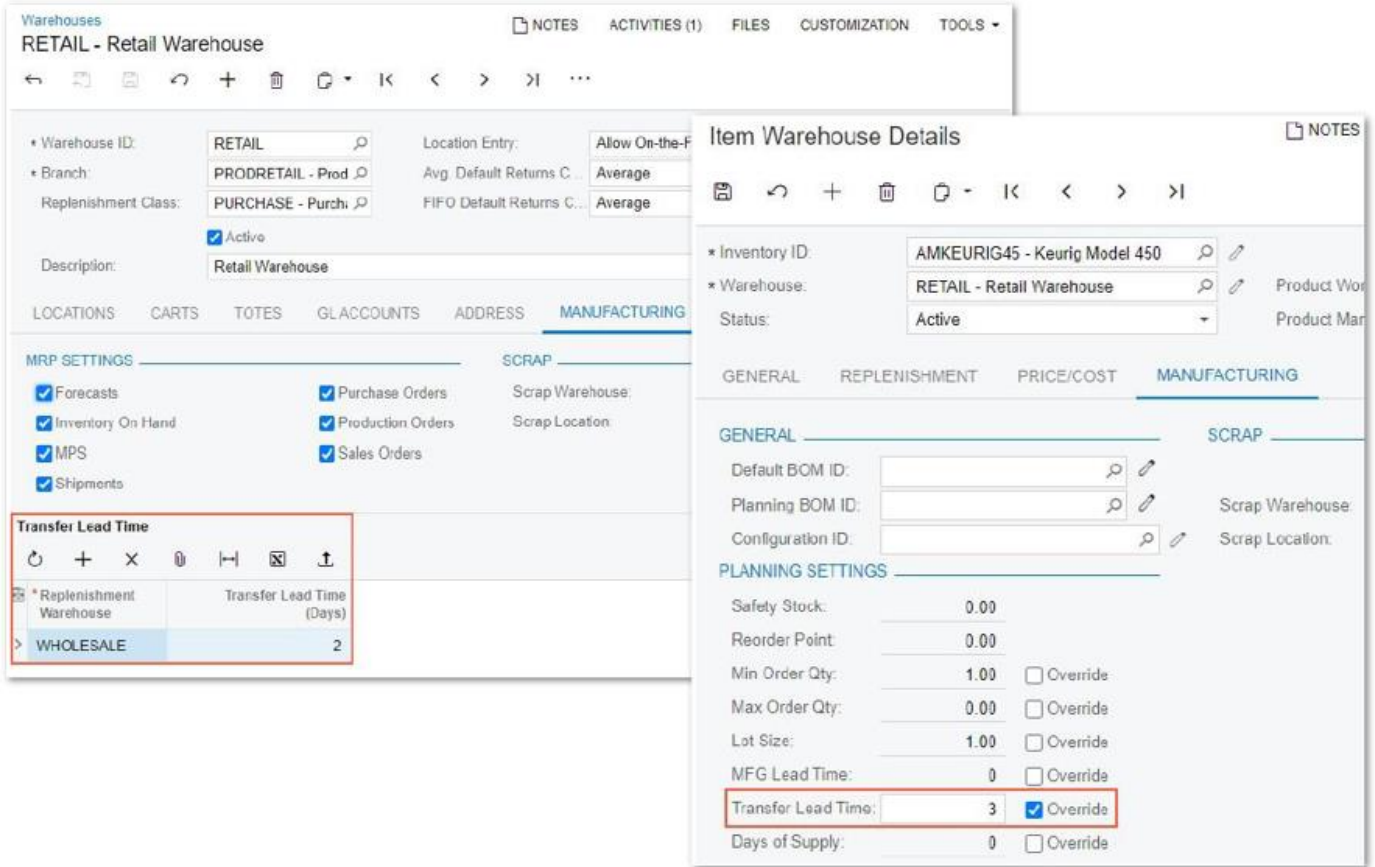


#### Enhanced Support for Transfers in MRP

In previous versions of MYOB Advanced, when the system performed material requirements planning (MRP), it did not create planned orders for possible transfer orders.

In MYOB Advanced 2022.2, during MRP, the system creates planned transfer orders for items that can be transferred from another warehouse and uses the new transfer lead time settings to calculate the action dates for the orders.





### Control of Excessive Item Quantity for Operations

In the previous versions of MYOB Advanced, when a shop floor operator created a move transaction on the Move (AM302000) form or a labour transaction on the Labour (AM301000) form, the operator could mistakenly enter an excessive quantity of completed items for production operations or record completion of the same items several times.

In version 2022.2, to give production managers the ability to minimise or eliminate these data entry mistakes, the Exceeding Qty. for Operations setting has been introduced on the Production Order Types (AM201100) form.

### Restricted Visibility of Customers and Suppliers

Starting in 2022.2, on forms of MYOB Advanced, lists of customers and suppliers are displayed according to the access rights of the signed-in user and the restriction settings specified in customer or supplier classes. An implementation manager can restrict the visibility of customers or suppliers of a particular class by branch or by company.

### Side Panel Support for Lists of Records

In MYOB Advanced 2022.2, a side panel has been added to multiple lists of records, including:

- Production Order Maintenance (AM2015PL)
- Bill of Materials (AM2080PL)
- Engineering Change Request (AM2100PL)
- Engineering Change Order (AM2150PL)
- Configuration Maintenance (AM2075PL)
- Estimates (AM3030PL)
- Estimate Operation (AM3040PL)

### Support of Blanket Sales Orders in MRP

In MYOB Advanced 2022.2, blanket lines of a blanket sales order that are planned for dates in the future are now included in MRP and are processed similarly to forecasts. Child sales orders generated from a blanket sales order are also included in MRP and are processed the same as regular sales orders are.

### Other Enhancements - Manufacturing

In MYOB Advanced 2022.2, multiple improvements to the UI and management processes have been introduced:

- Setting to control Hold of new BOM Revision on Entry
- Enhanced Calculation of the Ship On Date for Transferred Materials

## 7. Mobile

### Ability to Edit the Main Screen

In the MYOB Advanced Mobile App, a user can now select which of the following sections should be displayed on the main screen and change their order:

- KPIs
- Recently visited records
- Favourite screens and records
- Workspaces

### Adjustment of Colours to Fit the Company's Colour Scheme

The MYOB Advanced Mobile App now adjusts the colour of the UI elements on the following screens according to the primary colour specified on the Companies (CS101500) or Branches (CS102000):

- Sign-In screen
- Main menu
- Workspaces
- Screens that correspond to MYOB Advanced forms

## 8. Platform

### Ability to Specify a Custom Title to Side Panels

In MYOB Advanced 2022.2, the ability to specify a custom title of the tab has been added.

### Ability to Generate GS1 EAN/UCC-128 Barcodes in Report Designer

In previous versions of Report Designer for MYOB Advanced, the system did not support the GS-128 EAN/UCC-128 barcodes. In Report Designer for MYOB Advanced 2022.2, the ability to generate barcodes of this type has been implemented.

### Improved Diagnostics for Business Events and Push Notifications

In MYOB Advanced, push notifications and messages triggered by business events are queued for processing. In some circumstances queues may become overloaded and the system may stop queuing and processing messages. In 2022.2, the functionality of the System Queue Monitor (SM302010) form has been reworked to provide tools for monitoring and troubleshooting a queue's health.

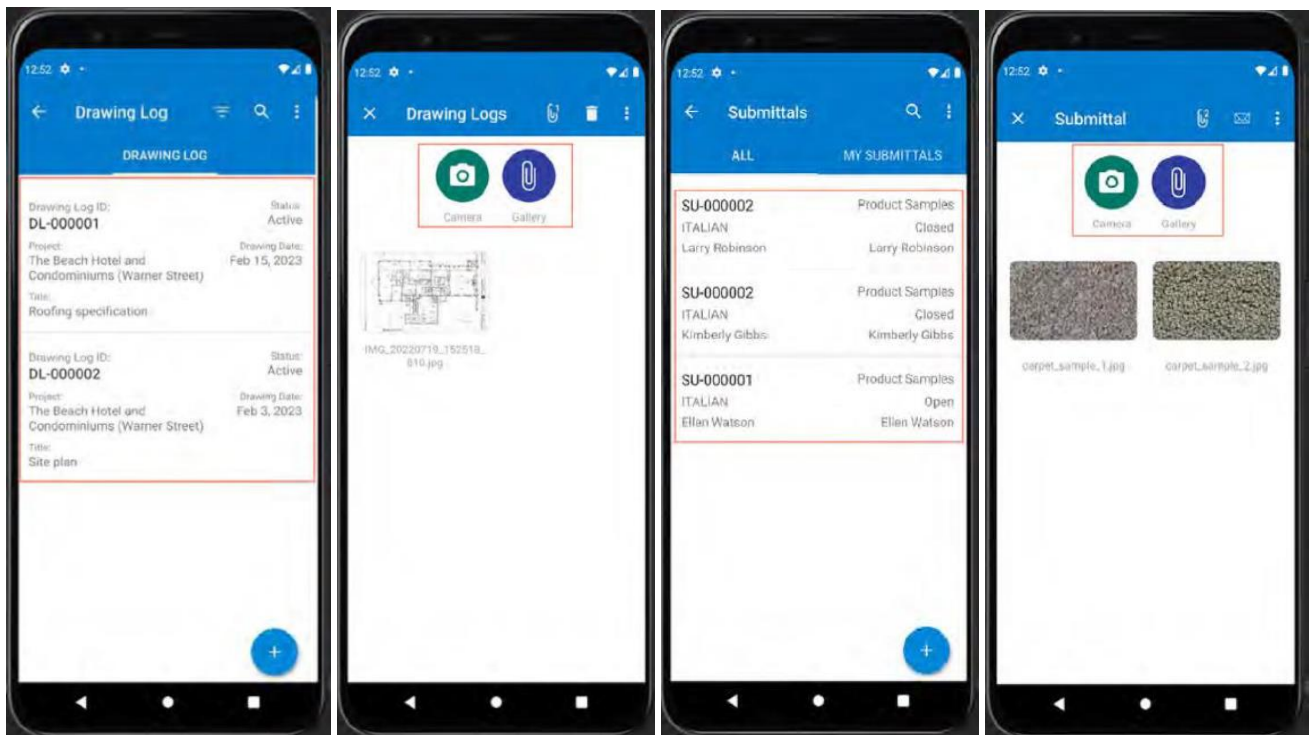
### 9. Projects/Construction

#### Enhancements in Change Management

In MYOB Advanced 2022.2, additional scenarios have been implemented for change management. Now users can close change requests that are linked to cost-only change orders, cancel change orders and change requests, and keep rejected change orders and change requests without these rejected documents affecting the project budget amounts.

#### Mobile App Enhancements - Construction

In the MYOB Advanced Mobile App, the user can now view, create, and update drawing logs and submittals by using these screens.



\*\*There are certain limitations to be reviewed in release notes.

#### Tracking Project Progress by Unit

In MYOB Advanced 2022.2, new functionality for tracking project productivity has been introduced. With this new functionality, employees working on a construction site can capture project activities on the unit level and track project progress by using a new type of document: Progress Worksheet (PM303000).

On the Approval Maps (EP205015) form, the new Progress Worksheet entity type has been added to give administrators the ability to configure approvals for progress worksheets.

## 10. Usability

### Built-In Infotips

In MYOB Advanced 2022.2, context-sensitive Help infotips have been introduced to give users an explanation of a UI element right on the spot. An infotip is a small pop-up window that describes the UI element the user is hovering over or pointing to.