MYOB Advanced

AU-001 – User Interface – Modern and Classic UI

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Participants

You are an MYOB Advanced user.

Prerequisites

You know your way around a computer.

You understand business processes and procedures.

You will need to have a MYOB Advanced installation with the 2016_DemoAU company which is in the local installer.

Conventions used in this manual

- Buttons or icons that you must click or select are shown in **bold**.

- Anything to be typed is shown in **bold**.

- Keyboard keys are shown in **bold** or .

> Depending on your role which has been set up in MYOB Advanced, some of the menus and modules in this manual may look different to your system. Screenshots in this manual are for illustration purposes only and may also look different from those in your system due to configuration settings.

Objectives

MYOB Advanced is a highly configurable cloud based ERP program.

We have written these manuals to cover processes which are generic to most businesses.

In this course, you will get an overview of the MYOB Advanced interface. Once this course is completed you will be able to:

- Open a MYOB Advanced cloud site.
- Navigate through the menu structure, the forms(screens) and their elements.
- Search for a document.
- Process Data
- Run Reports
- Set up your User profile and manage your favourites.

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Log In

MYOB Advanced can run in most browsers. e.g.

- Goggle Chrome
- Firefox
- Internet Explorer
- Safari

Once you have entered in your URL in the browser window you will be asked for your log in credentials.

Activity 1

1. Open your preferred browser and enter in your MYOB Advanced URL. <UPDATE URL>.

Figure: MYOB Advanced log in screen.

2. Enter your Username and Password:

Username	
Password	

If you forget your username and/or password, you can click on the Forgot Your Credentials? hyperlink. This will send an email to your designated email address which has been set up in MYOB Advanced. Password recovery is only available if this option has been selected on your user profile.

Introduction to the MYOB Advanced User Interface

MYOB Advanced now offers two user interfaces:

- **Modern,** introduced in 2018.01, which is now used by default
- **Classic,** which is the user interface used in previous MYOB Advanced versions

The following sections describe the main aspects of working with MYOB Advanced user interface when you complete this course:

- *Completing the Training in the Modern UI*
- *Completing the Training in the Classic UI*
- *Navigating to Forms: Tips*

Completing the Training in the Modern UI

For completing the training, we recommend that you use the modern user interface, which provides an enhanced new look and easy navigation in the system. The following sections provide an overview of the modern UI and explain how to navigate in the system during the completion of the training.

To Navigate to a Form from a Quick Menu

Forms in the modern UI are grouped by workspaces, which are shown on the main menu on the left side of the screen. When you select a workspace, the system shows its Quick Menu, which has links to the most commonly used forms and reports of the workspace (see the screenshot below), listed under categories to further organise them. You can click a form name to navigate to it.
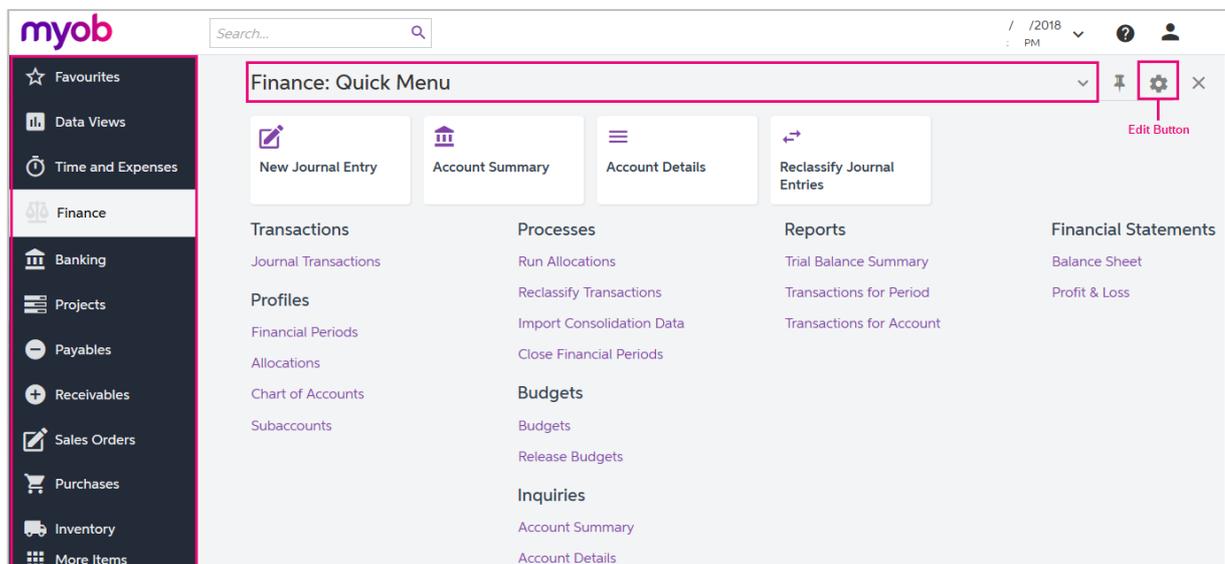

Figure: Navigating to a form from a Quick Menu

To View All Forms in a Workspace

To find any form of a workspace that is not shown on the Quick Menu, you can click the Quick Menu title bar to switch to **All Items** mode. In this mode, you can see the links to all forms that are included in the selected workspace (see the screenshot below).
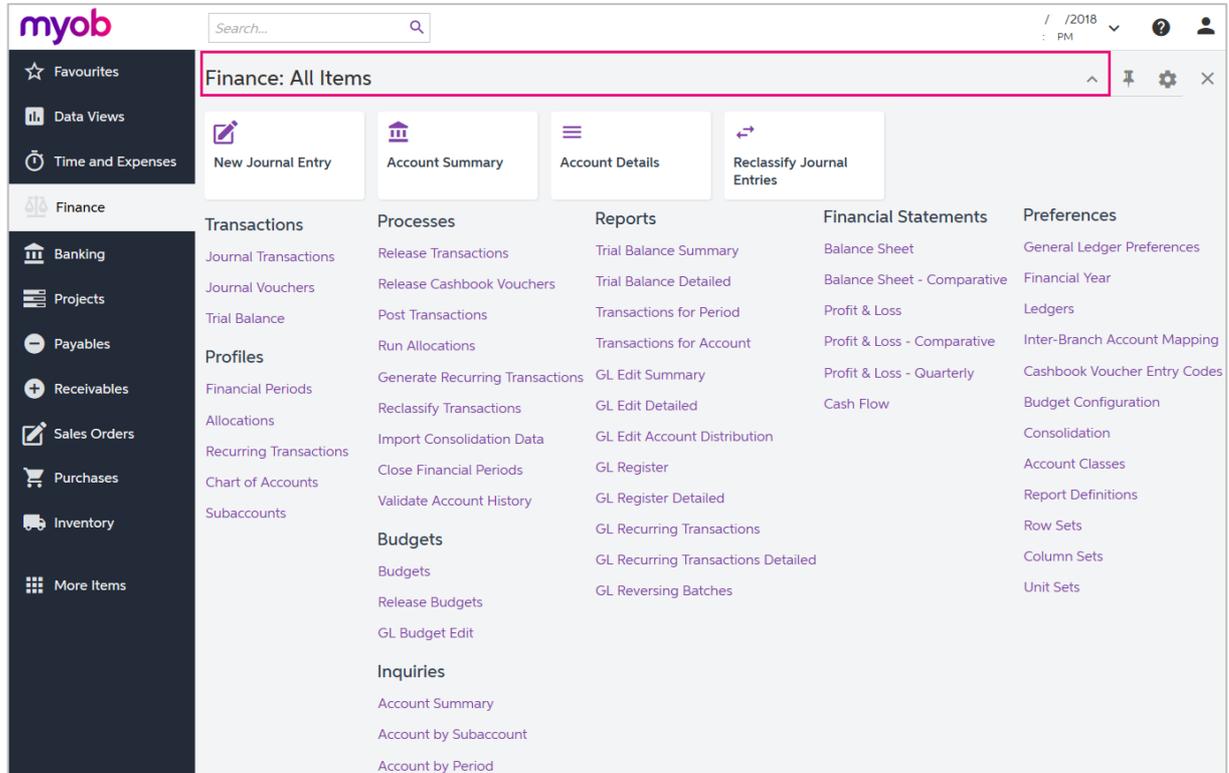

Figure: Displaying all items of the Finance workspace

To Add Forms to a Quick Menu

To add a form that currently is not shown on a Quick Menu of a workspace, open the needed workspace, and on the workspace title bar, click the **Edit** button (see the previous screenshot). In **Configuration** mode, select the check boxes next to the needed forms, and then click **Exit** to apply your changes and exit **Configuration** mode.

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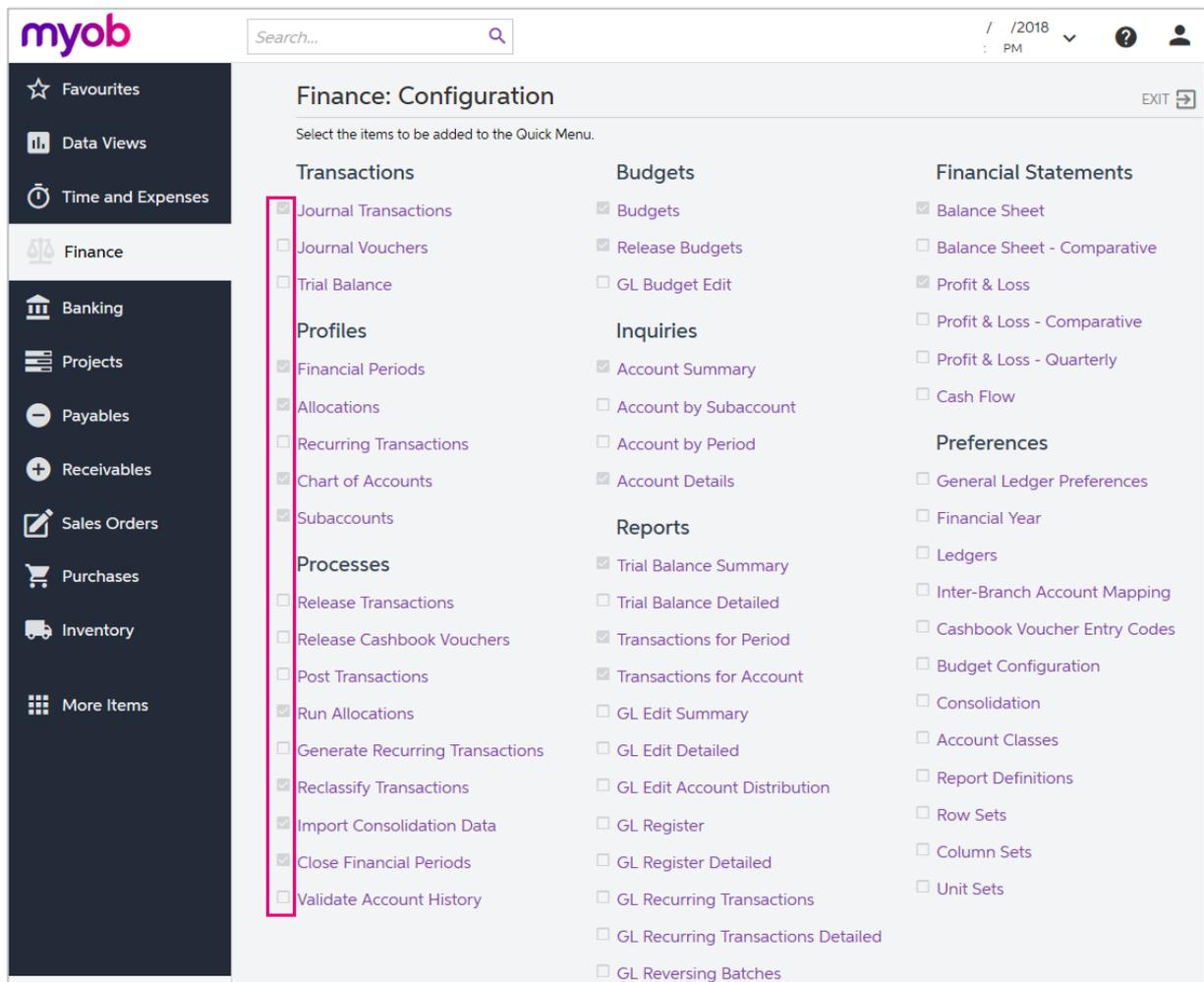
Figure: Adding forms to a Quick Menu

The full list of forms used during the completion of this training is provided below in this topic. We recommend that you be sure all these forms have been added to the applicable quick menus, to simplify navigation during the completion of the training.

To Review and Open Documents on Search Forms

Search forms provide a quick and easy way to review the list of records created on the applicable data entry forms. A search form is a generic inquiry that shows the summary information on the records entered on the entry form. Search forms are initially brought up instead of the corresponding entry forms when a user navigates to these forms in the Quick Menu.

For example, if you click **Journal Transactions** (under the **Transactions** category) on the Quick Menu of the **Finance** workspace, the system opens the **Journal Transactions** search form (GL3010PL), which shows the list of all transactions in the system (see the screenshot below). The search form may show tabs that filter the documents by their type or status.

To open the **Journal Transactions** entry form (GL301000) for entering a new batch of transactions from the **Journal Transactions** search form (GL3010PL), you need to click **Add New Record** button on the form toolbar.

Figure: Viewing the Journal Transactions search form

If the training instructions ask you to open a document (such as a batch, a Payables bill, or a Receivables invoice), you can find this document on the appropriate search form and then click its reference number link to open this document on the data entry form. Alternatively, you can open the data entry form itself, select the module or document type (depending on the form), and in the **Reference Nbr.** box, click the selector icon and select the document by its reference number (see the screenshot below).

Figure: Opening a document by its reference number

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Navigating to Forms: Tips

The following tips apply to the modern and classic user interfaces and will help you to quickly find and open any form.

How To Search for a Form by Its Title or ID

At any time, you can quickly search for a form by typing its title or ID in the Search box:

- In the modern UI, type the text in the Search box on the top of the screen (see the following screenshot). The system shows the search results in the Search window, which opens when you start typing the text in the Search box. Then on the **Menu Items** tab of the Search window, you click the link to open the needed form.
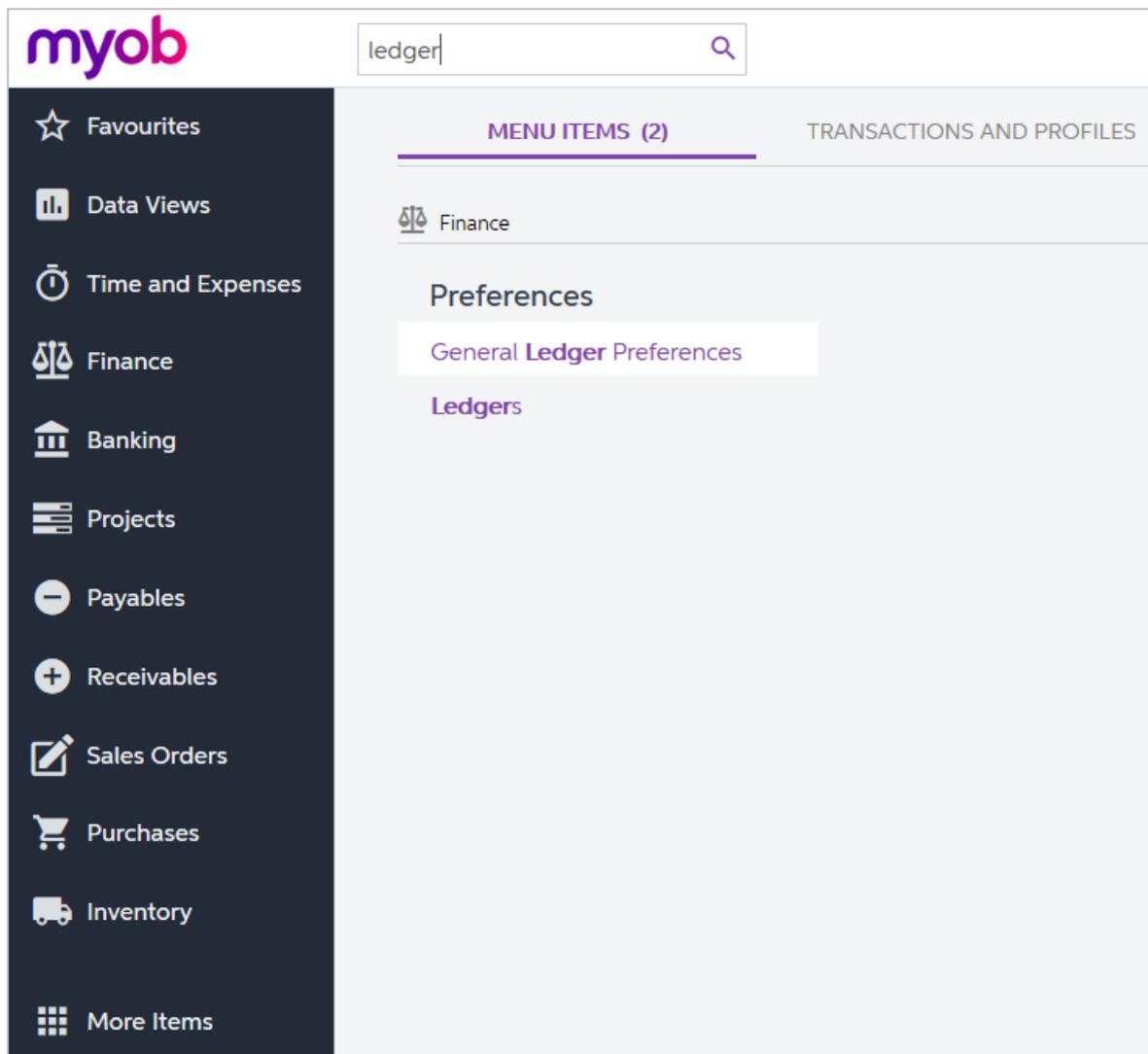
Figure: Searching for a form by title in the modern UI

- In the classic UI, type the text in the Search box at the top of the navigation pane (see the following screenshot). To navigate to the needed form, click it in the drop-down list with the search results.
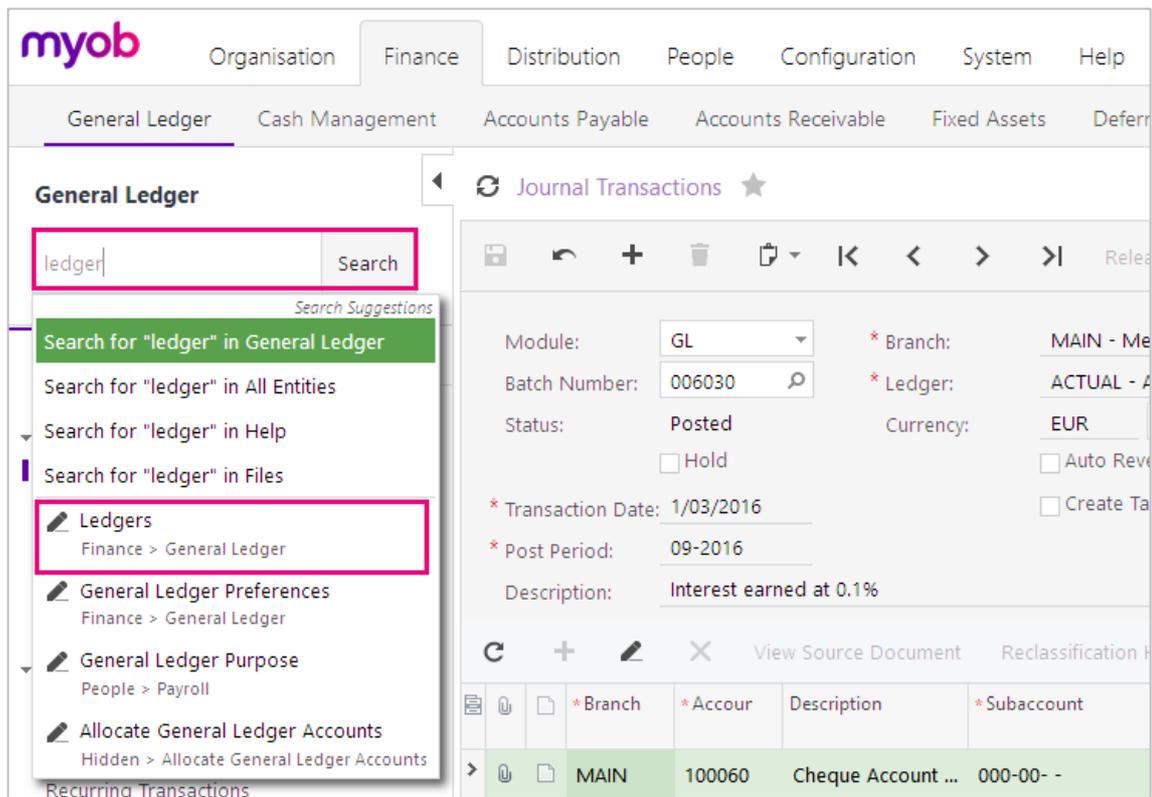
Figure: Searching for a form by its title in the classic UI

How To Navigate to Forms by Using the Form ID

In the training guide, each form is referred to by its ID. If you are not sure in which area a form is located, instead of searching for the form, you can simply open it by using its form ID. You can do this in both the modern UI and the classic UI as follows:

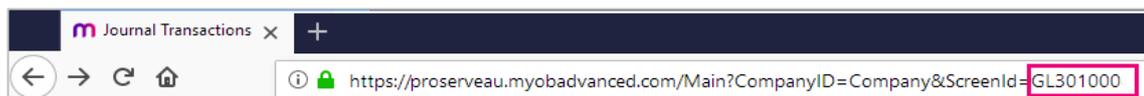1. In the browser's address bar, change the form ID of the currently opened form to the form ID of the needed form (see the screenshot below).

Figure: Entering the form ID

2. Press Enter. The system navigates to the form.

Completing the Training in the Classic UI

The following sections provide a quick overview of the classic UI and explain how to navigate in the system during the completion of the training.

To Switch Back to the Classic UI

When you have created a new company and signed in to it, the modern user interface is enabled by default. If you need to switch back to the classic UI, do the following:

1. In the top right corner, click the name of the current user, and click **My Profile**, as shown in the following screenshot.
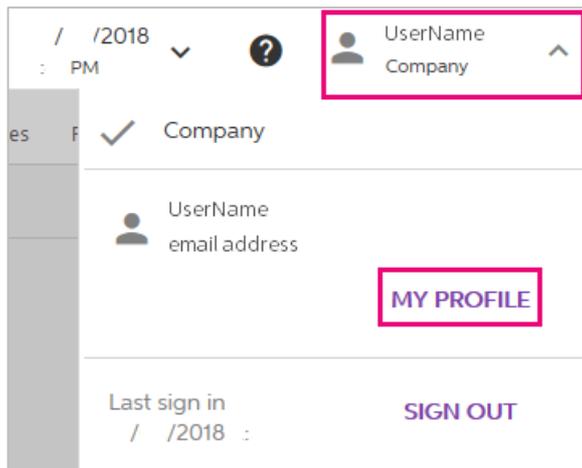
Figure: Opening the user profile

2. On the **User Profile** form (SM203010), which opens, select the **Show Classic UI by Default** check box, and save your changes.

To switch back to the modern UI, again click the name of the current user in the top right corner and click **Switch to Modern UI** in the menu (see the screenshot below)
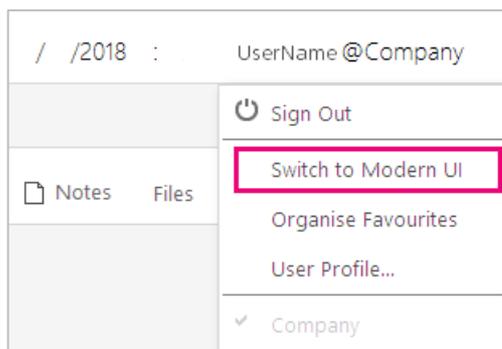
Figure: Switching to the modern UI

To Navigate to Forms in the Classic UI

To help learners to search for forms during the training completion in the classic UI, the paths to forms in this training guide are based on the classic UI. The main menu, at the top of the screen, shows suites and the modules of the selected suite. The navigation pane, located on the left side of the screen, shows the forms of the modules grouped by their functions. The path to a form is specified as follows in the training:

Form Title (Form ID; Suite > Module > Tab > Node)

For example, the form with the following path is shown in the screenshot below:

General Ledger Preferences form (GL102000; Finance > General Ledger > Configuration > Setup)

Figure: General Ledger Preferences form in the classic UI

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Adding Records

Let's create a new record to review the options available when information is updated to MYOB Advanced.

Activity 2

1. Open the **Journal Transaction** form (GL301000; Finance > General Ledger > Work Area > Enter > Journal Transactions.

2. Click on the add new record ➕ button on the form toolbar.

Figure: New general ledger journal

The Business Date will default as the **Transaction Date.** If you want to change the Business Date, click the Date on the main menu DD/MM/YYYY HH:MM .

Any mandatory fields are marked by a red asterisk * these fields must be updated with the correct information to save the document.

In any form, if you see <NEW> in the placeholder field, e.g. **Batch Number,** this indicates that the system will give you a value automatically when the record is saved. This value comes from the **Numbering Sequences** in the **Configuration** suite.

3. In the **Journal Transactions** form, click on the ➕ button on the grid toolbar or click within the grid area to insert the first row and enter the following details;

Find the **Account** and **Subaccount** by clicking the magnifying glass on the field

, this will bring up a list of **Accounts** and **Subaccounts.** You can then use additional search filters within the search popup windows to find the information you require. You can also use the **F3** key to display a list from a searchable field.

Figure: New transaction on the journal transaction grid.

Columns marked with * are mandatory and must be updated correctly for the record to be saved.

Tab or **Enter** keys can be used to move to the next column or field in MYOB Advanced.

4. Delete the row you added to the journal.

To delete a record from the grid, select or highlight the row in the grid and then click ⊠ on the grid toolbar.

If you have many rows on a grid, you can switch between grid and form view by clicking on the ✎ button. To go back to the grid view, click button again.

Figure: Form View of a general ledger journal transaction

Rearranging Columns

In any form in MYOB Advanced you can rearrange the columns, change the column size, hide unnecessary columns or display hidden columns.

To rearrange the columns, hide unnecessary columns and display hidden columns click on the button on the grid toolbar (the first column). The following popup will display with all the columns of that form.

Figure: Dialogue box of fields available on a general ledger journal transaction.

Remove unnecessary columns from the **Selected Columns** list by highlighting the column name and either double-click on the name or click the highlighted arrow in the middle of the **Available Columns** and **Selected Columns.** To add columns to the grid, highlight the column name in the **Available Columns** and move to the **Selected** Column using the same method.
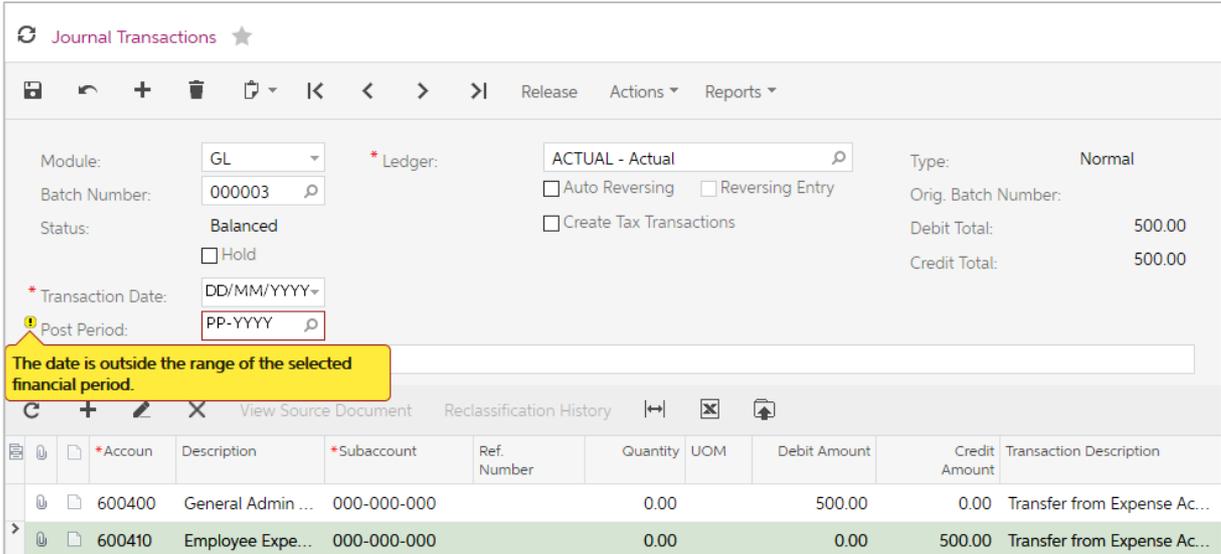
Activity 3

1. On the *Journal Transaction* form (GL301000), click on the [image] button on the grid toolbar.

2. Move the **Ref. Number** column from the **Selected Columns** to the **Available Columns**, click **OK.**

Warning and Error Messages

When entering information into MYOB Advanced, a yellow warning symbol will appear if there is any mismatch. To find out the details of the warning message, hover your mouse over the yellow symbol, this will display the message. A red error message will appear if you enter information that is invalid for that field and will not allow changes to be saved.

Activity 4

1. On the *Journal Transaction* form (GL301000) change the **Post Period** to be one period in the future without changing the date. A yellow 🔔 icon will appear next to the **Post Period** label. Hover your mouse over the 🔔 and a message will appear. In this case the message is telling you that the **Transaction Date** and **Post Period** are not aligned.

Figure: Warning message for mismatch in dates

2. Change the **Post Period** back to the original period.

3. In the *Journal Transaction* form (GL301000) enter **89000** in the **Account** field. When you tab or enter out of the field a red ⊗ error message will appear in the **Account** field. Hover the mouse over the ⊗ and the details of the error message will appear.

Figure: Error message.

4. Delete **89000** from the **Account** field.

Attachments

Files can be attached to a document by using the **Files** menu. In the form title bar click **Files.** A popup will appear where you can browse, upload and manage files. Once a file has been attached to a form a number appear next to the **Files** menu, this displays the number of files that have been attached to the form.

Activity 5

1. Remaining in the *Journal Transaction* form (GL301000), select the Files menu from the form title bar.

Figure: Dialogue box for attachments

2. Click **BROWSE** to select the file to be attached to the form.

Alternatively, you can simply drag and drop the file to the summary area of the form.

Copying a Record

On most forms, the form toolbar has buttons for navigation and data manipulation. For example, you can select the clipboard dropdown and copy a record and past the information in a new document.

Activity 6

1. Remaining in the *Journal Transaction* form (GL301000), select a batch by double clicking on the line, from the Batch Number search window, **e.g. GL Batch Number 5508** as shown below.

Figure: Batch Number Search Window

2. From the dropdown list for the clipboard [icon] on the form toolbar select **Copy**

Figure: Copying a record on a form.

3. Add a new **GJ Journal Transaction** by clicking the [+] on the form toolbar.

4. From the dropdown list for the clipboard on the form toolbar select **Paste.** The new journal has been created as a copy of the original **GL Batch**.

5. **Save** the new journal by selecting the **Save** [icon] icon on the form toolbar.

Inquiry form as the primary view

The primary or first view that is presented to users can be a list of documents rather than individual documents. In some modules of MYOB Advanced a list of documents is the default view presented.

Activity 7

1. Open the *Contacts* form (CR3060PL); Organisation > Customer Management > Work Area > Enter.

2. Select the **All Records** tab. The contacts are displayed on an inquiry form which is divided into tabs.

Each tab is a filter you can configure in the system. You can search for a record on each tab by using the search field [ ] on the form toolbar.

To view an individual record, select the line and then double click.

Searching for a Document

There are several ways to search for a document in the system. Let's say we want to find the **Bill No. 001637** in the **Accounts Payable** module. One way is to find the document on the *Bills and Adjustments* form (AP301000), where it was created.

Search from the original entry screen.

Activity 8

1. Open the *Bills and Adjustments* form (AP301000); Finance > Accounts Payable > Work Area > Enter.

2. Click the Search icon [🔍] next to the **Reference No.** box. A lookup table will be displayed, enter *637* in the search field [🔍] on the lookup toolbar.

3. The lookup table will display all records that contain 637.

Full Text Search

You want to find out whether ABC Studios is a customer or supplier and what was the last documents updated for them.

4. Click on the Organisation module on the top of the screen.

Figure: Organisation Module

5. In the box under the Communication heading in the navigation pane, enter *ABC*. A dropdown will appear with **Search Suggestions.** We would like to see if ABC Studios is a customer or supplier so we will select **Search for "ABC" in All Entities.**
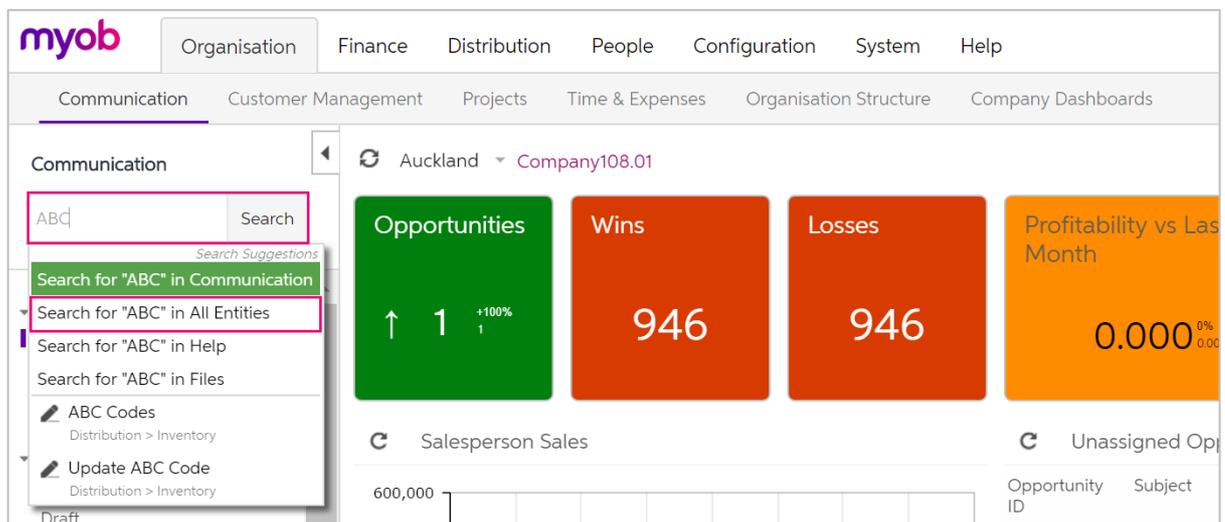

Figure: Full Text search

Once we have selected the **Search for "ABC" in All Entities,** the following results appear in the work area.

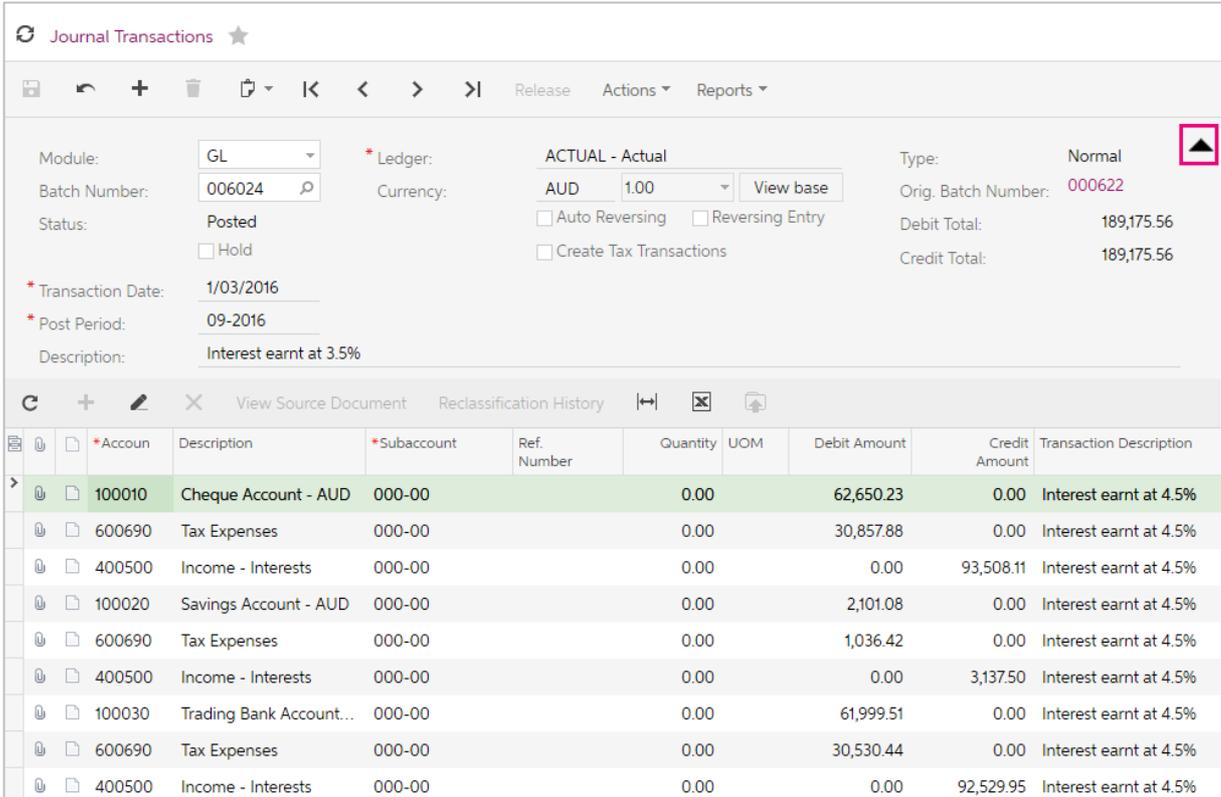*Figure: Some results from searching in all entities*

You can see from the list that ABC Studios Inc. is our customer and they have open sales orders.

Collapsing work panes

Activity 9

1. Open the *Journal Transaction* form (GL301000); Finance > General Ledger > Work Area > Enter > Journal Transactions.

2. Search for **GL Batch Number: 006024** and bring this journal to the screen.

   Sometimes you might need to give more space to the detail area. Particularly if the grid area contains many lines. You can collapse the summary area by clicking the arrow button ▲ in the top right corner of the form.

Figure: location of the arrow to collapse or expand the header of a form

3. Click the arrow button ▲ on the journal to collapse the header of the form.

4. Click the arrow button ▼ again to return the form to its original view.

   To see more columns on your form you can also collapse the **Navigation Pane**.

5. Click the arrow button ◀ at the top left part of the form.

6. Click this button again to return the **Navigation Panel**.

Sorting and filtering records

In any table in the system you can sort the record by one column and filter by one column or multiple columns.

Activity 10

1. On **GL Batch Number: 006584** sort the records by the **Account**. Click the **Account** column header and click **Sort Ascending** on the column dialogue box that is displayed.

Figure: Sorting and filtering dialogue box

2. Go to the GL Batch Number 000063 and click on the **Debit Amount** column heading.

3. In the dialogue box that is displayed, select **Is Greater Than** and enter a **Value: *5000***.

4. Click ok to filter the records so only debits over $5,000 will be shown.

Figure: searching for transactions by amount

5. Click on the **Description** column heading and in the dialogue box that is displayed, select **Contains and** enter **Tax** in the filter box.

6. Click **OK** to display debits over $5,000 that contain Tax in the description.

   To clear any filters, click on the column header that contains the **Filter** icon and click on **Clear Filter.**

7. Click on the **Description** column header and click on **Clear Filters** on the dialogue box.

8. Repeat the above for the **Debit** column.

> Note the values on the filtering and sorting dialogue box may differ depending on what form you are using in MYOB Advanced.

Inquiry Forms

In the explore group of the **Work Area** tab, there are inquiry forms. On an inquiry form you can select records by specified criteria.

Activity 11

1. Open the *Account Summary* form (GL401000); Finance > General Ledger > Work Area > Explore > Account Summary.

2. Select **CASHASSET** in the **Account Class** box. The records will be filtered by the specified **Account Class.**

3. Export the records to an excel file by clicking **Export to Excel** button 🗗 on the form toolbar.

4. Highlight the **Account** 100010 and click the **Account Details** link on the form toolbar. This will take you to the **Account Details** inquiry for this account.

You can save the selection criteria by clicking the **Filter Settings** button 🔻 on the form toolbar.

5. Click the **Filter Settings** button 🔻.

6. On the dialogue box add a new line and enter the following details.
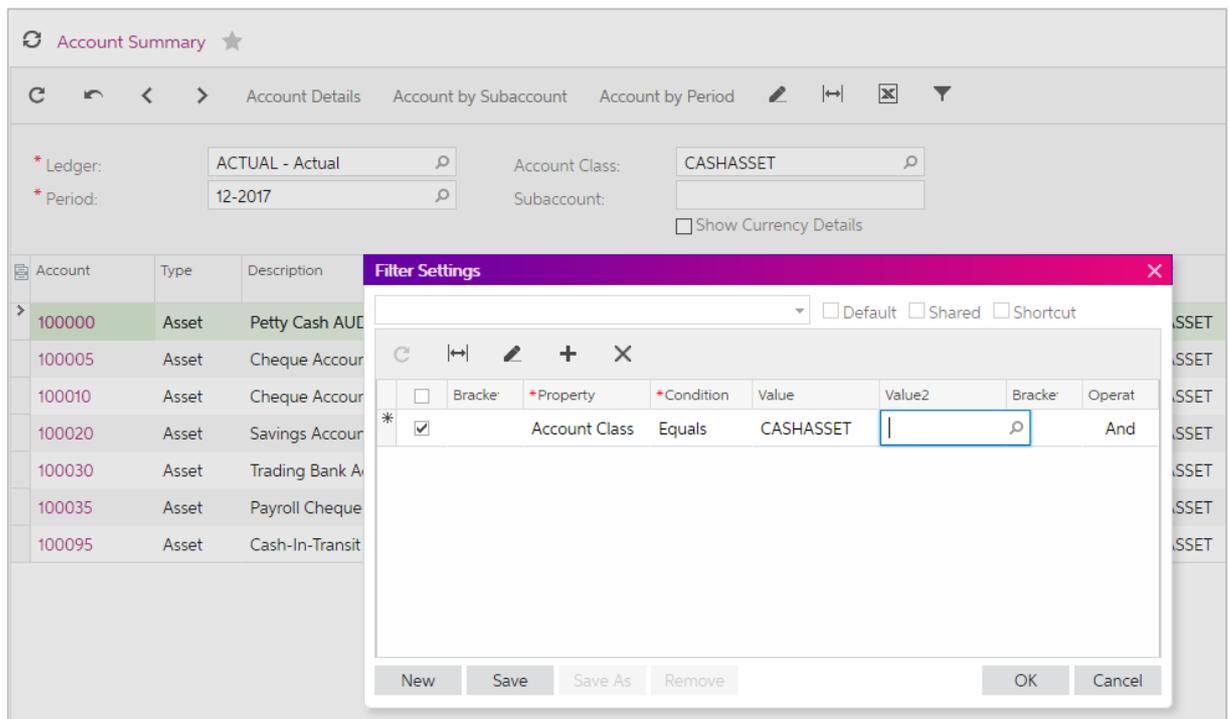
Figure: filter settings dialogue box.

7. **Save** the **Filter Settings** with the filter name of **CASHASSET**. This filter will be added to the **Account Summary** form as a new tab.

Data Processing

On the **Processes** tab on the **Navigation Pane** there are processes that allow for the mass update of information.

Activity 12

1. Open the *Post Transactions* form (GL502000); Finance > General Ledger > Processes > Daily > Post Transactions.

   The form shows a list of transactions that have been released by not yet posted.

2. On the form toolbar, click **POST ALL**. This will post all the transactions that were listed.

   If you only wanted to post one or a selection of the transactions listed, click the selection box on that line and select **POST.**

Figure: selecting one record on a grid.

To select all records on the page, click the selection box on the header of the grid and select **POST**.

Figure: selecting all records on the grid.

If you are on a processing form and there are multiple pages, selecting all on the grid toolbar will only select those records on that page. If you want to process all records go to the form toolbar and click **Process All.**

On any processing form you can set up a schedule that automatically runs the processing operation of all records that match the criteria of the processing form at the specified time.

Figure: Dialogue box for Automation Schedules.

Reports

Activity 13

1. Open the *Trial Balance Summary* form (GL632000); Finance > General Ledger > Reports > Balance > Trial Balance Summary.

2. On the **Report Parameters** tab, specify the following parameters. Mandatory selection criteria are marked with an asterisk.

Figure: Report Parameters tab.

3. From the form toolbar, select **Run Report**. The system will generate the report based on the parameters selected. This report can then be exported to PDF or Excel or can be printed

To return to the report form click the pencil icon on the form toolbar.

Figure: Trial Balance Summary report.

You can save a set of report parameters as a template if needed.

Save as Template is not available in all editions of MYOB Advanced.

User Profile

In MYOB Advanced, you can personalise your account in ways to make using the system easier. You can specify your preferences for export to Excel, searches, favourites, and dashboards. Other users will not be able to view your personal settings.

Click on the user name on the right hand top corner of the screen and select *User Profile*. By using the *User Profile* form (SM203010), you can edit the following personal information.

- Your name used on your account
- Password
- Settings used for exporting to Excel
- System email account to be used by default for sending your correspondence through MYOB Advanced
- Date and time formats to be used for your user account
- Search preferences

Password Settings

If password recovery is allowed by company policy, you can provide a Password Recovery Question and Password Recovery Answer to be used in case you forget the password and need to acquire a new one in a secure way. The password recovery question and answer will be used as a hint and a "secret word" for your identification. If you provide the correct answer, the system generates a new password and sends it to your email account.

Some company policies may allow users to change their passwords when they choose to, rather than when they are forced to by the system. To change your password:

Activity 14

1. Click the **General Info** tab.
2. Click **Change Password** to open the related dialog.
3. Enter your old password and new password, and confirm the new password.
4. Click **Change Password**.

Next time you log into the system, you can use your new password.

Email Settings

Your personal email account is specified on the *Internal Users* form (SM201010).

You can select a system email account that will be used as the default email account when you send emails through MYOB Advanced. Incoming emails and replies to mass emails will be automatically sorted by the system and routed to your email account.

Excel Settings

You can define how data exported to Excel should be formatted. The following options are available:

- Whether hidden fields will be exported
- Whether cells will have a border

These settings may be changed at any time and they will be available only for your user's account.

Favourites

When you are on any form you can add that form as a **Favourite** by clicking the **Add to Favourites** icon next to the form's name. The star will turn yellow which indicates that the form is part of your favourites.
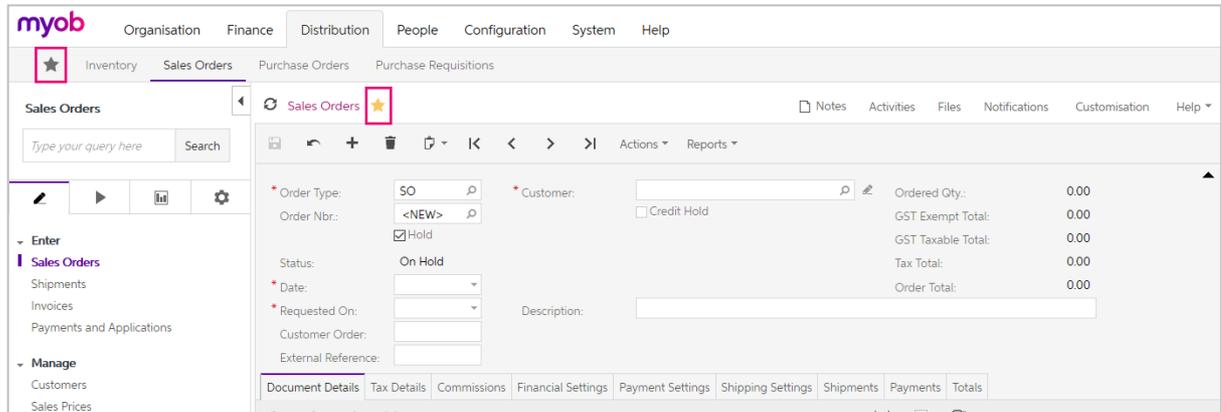

Figure: Sales Order form as a favourite.

Organising Favourites

You can manage your list of favourites using the *Favourites* form (EP203020) by clicking the **Favourites** icon on the **Main Menu** containing the modules and then click **Favourites** in the navigation pane.
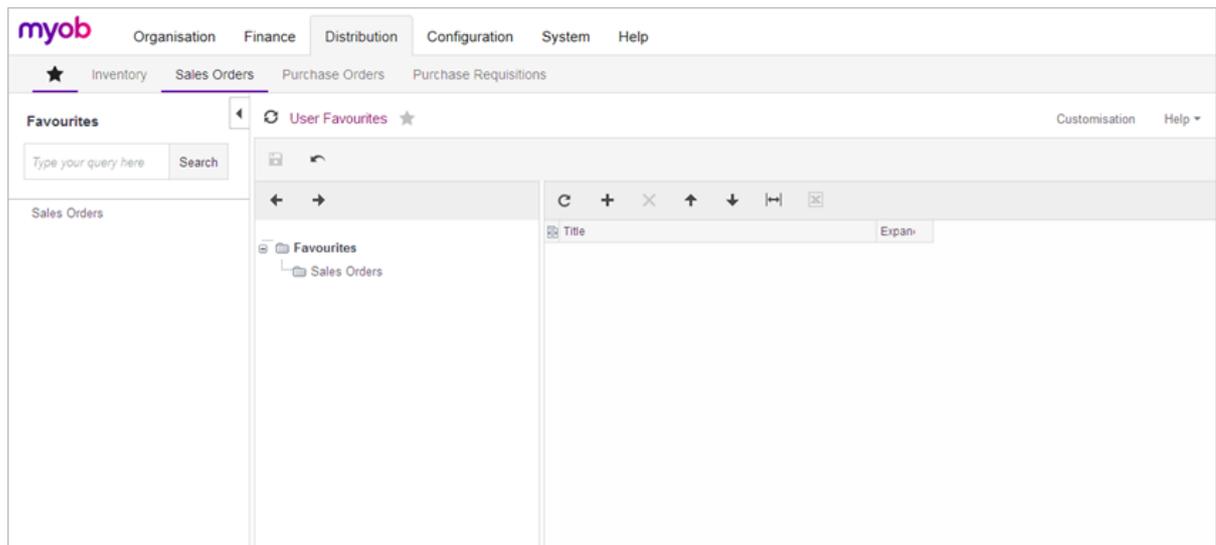

Figure: Manage Favourites screen.

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In the **Favourites** form, you can do the following:

- Rename links or folders:
    - In the left pane, select the folder containing the favourite.
    - In the right pane, double-click the favourite and edit the favourite's name.
    - In the form toolbar, click Save to save changes.
- Change the favourites order:
    - In the left pane, select the folder containing the favourites.
    - In the right pane, select the favourite and click Move Node Up or Move Node Down to change the favourite position in the list.
    - In the form toolbar, click Save to save changes.
- Move links into or out of a folder:
    - In the left pane, select the favourite.
    - Click Move One Level Up to move the favourite into the folder or Move One Level Down to move the favourite out of the folder.
    - In the form toolbar, click Save to save changes.
- Make the node expand and display links when you open Favourites:
    - In the left pane, select the folder containing the favourite.
    - In the right pane, select the Expanded check box in the favourite row.

simplify success