The MYOB Advanced Processes that you need to Know in a nutshell

# Purchasing

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## [Purchase Orders](#_Activity_7_–)

## [Purchase Receipts](#_Activity_8_–)

## [Landed Cost Purchase / Receipt](#_Activity_12_–)

## Back Orders

## Generating a Bill

## [Paying the Bill](https://d.docs.live.net/505d175de1187c11/Documents/MYOBAdvanced/UserTraining/AU-005.0003%20MYOB%20Advanced%20Finance%20EU.docx)

## Returning Goods and Processing a Debit Adjustment

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# Finance



**MYOB Advanced**

AU-003 – Purchasing

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# 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.

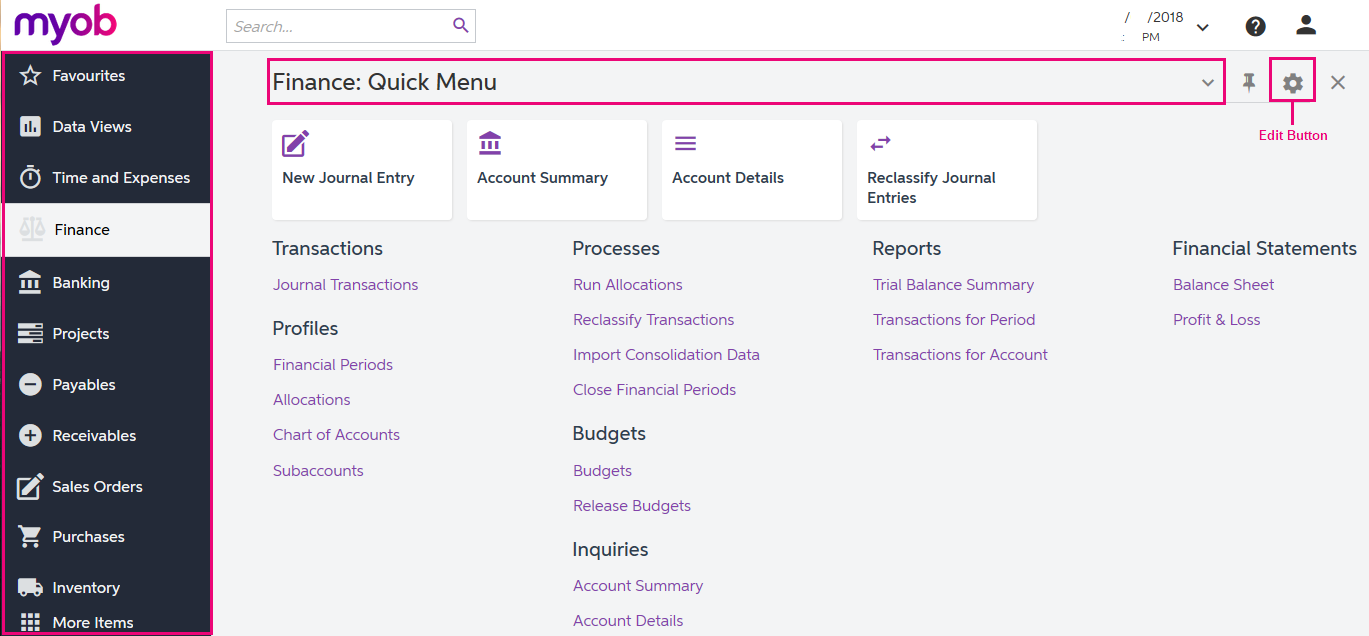


Figure: Navigating to a form from a Quick Menu

##### 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).

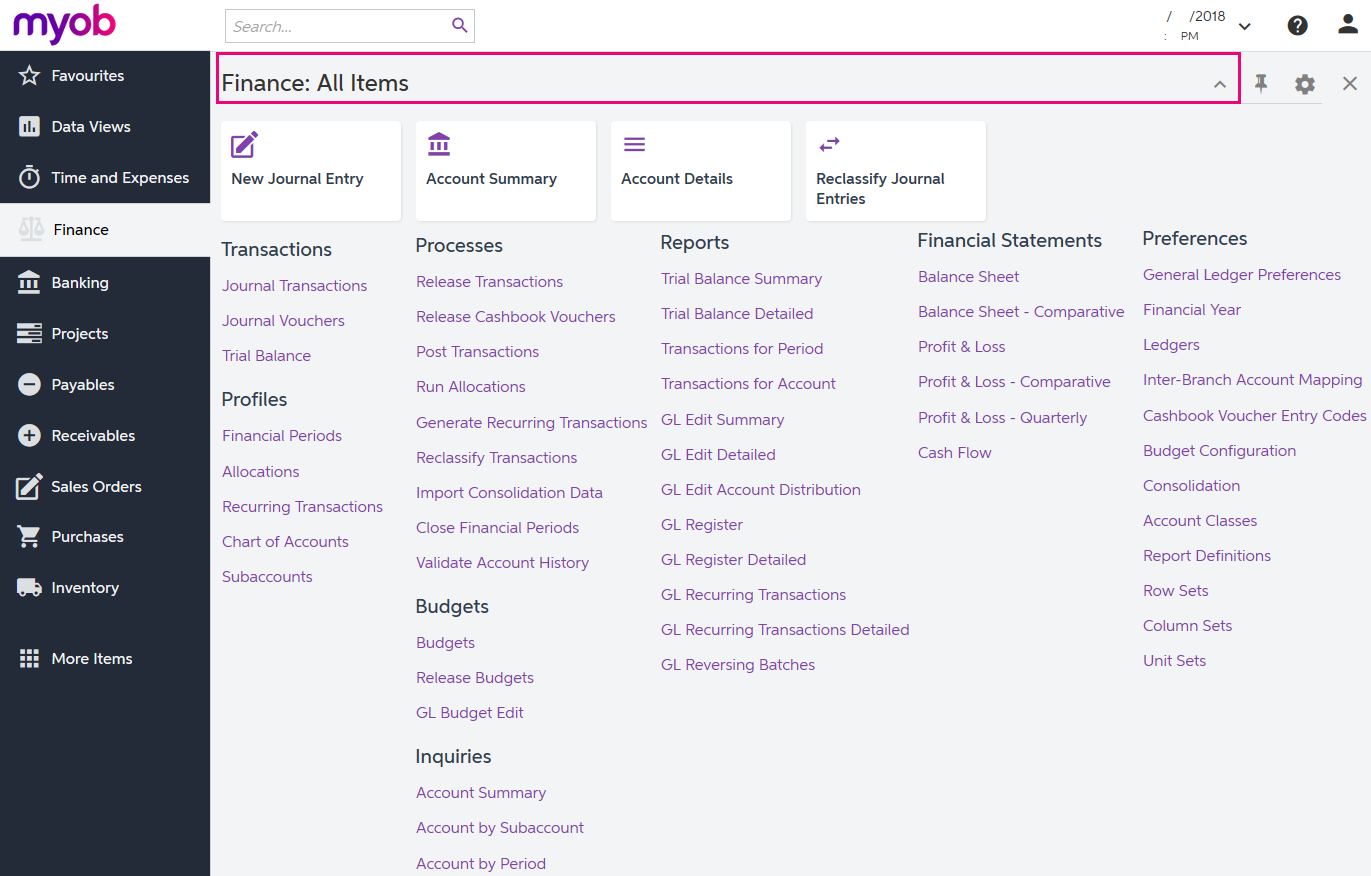


Figure: Displaying all items of the Finance workspace

##### 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.

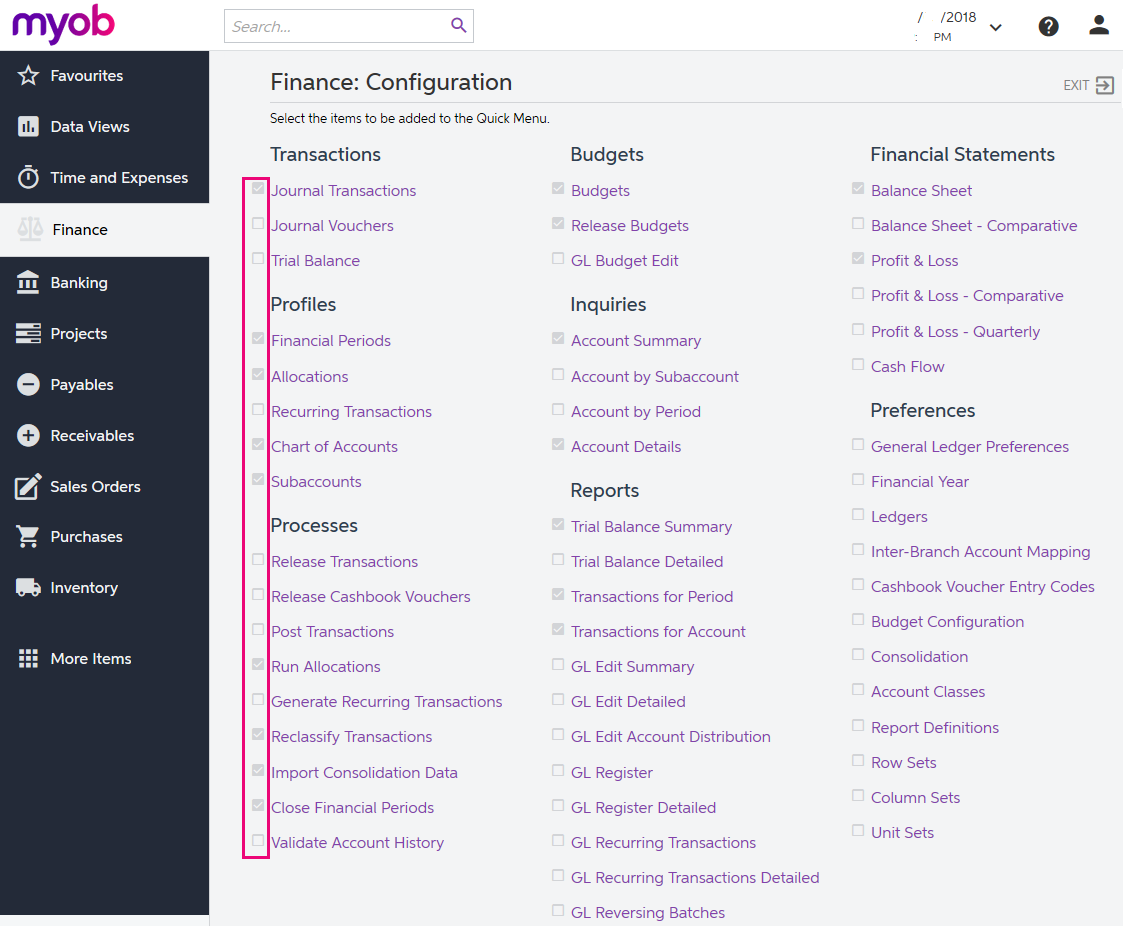


Figure: Adding forms to a Quick Menu

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.

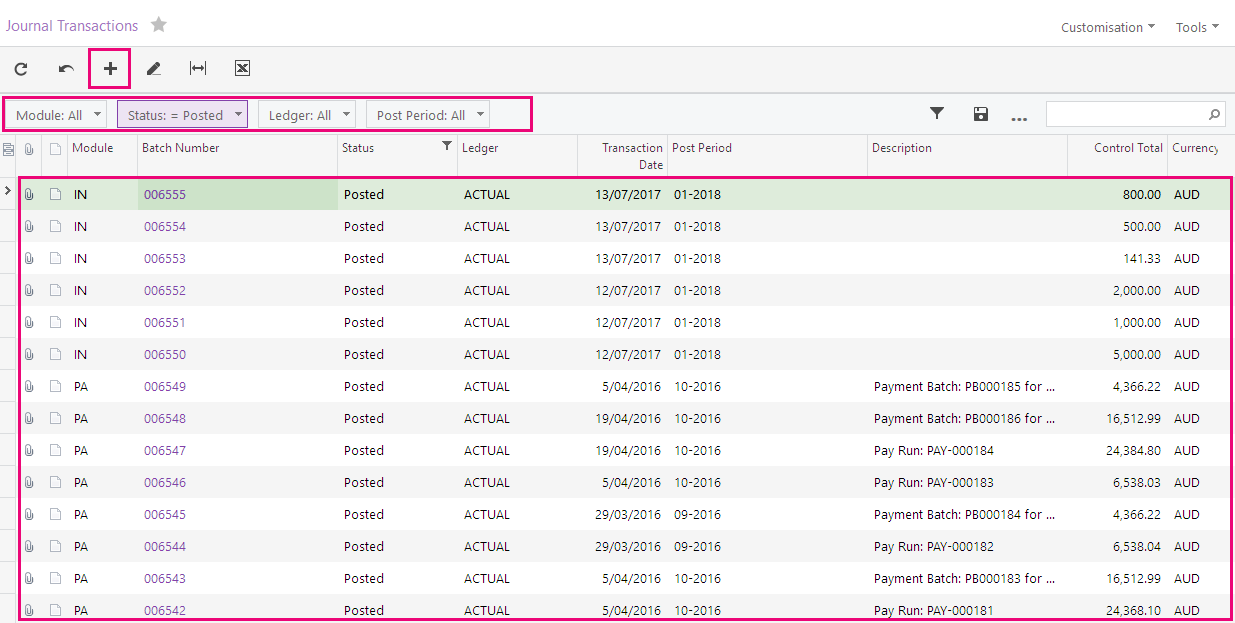


Figure: Viewing the Journal Transactions search form

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).

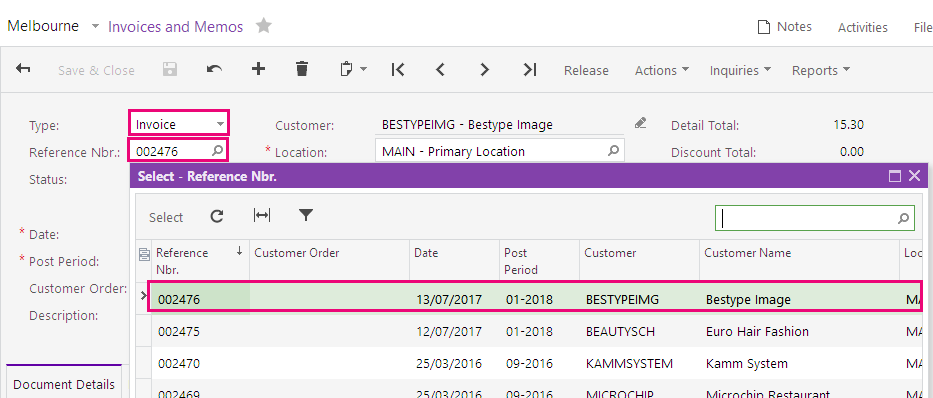


Figure: Opening a document by its reference number

## 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.

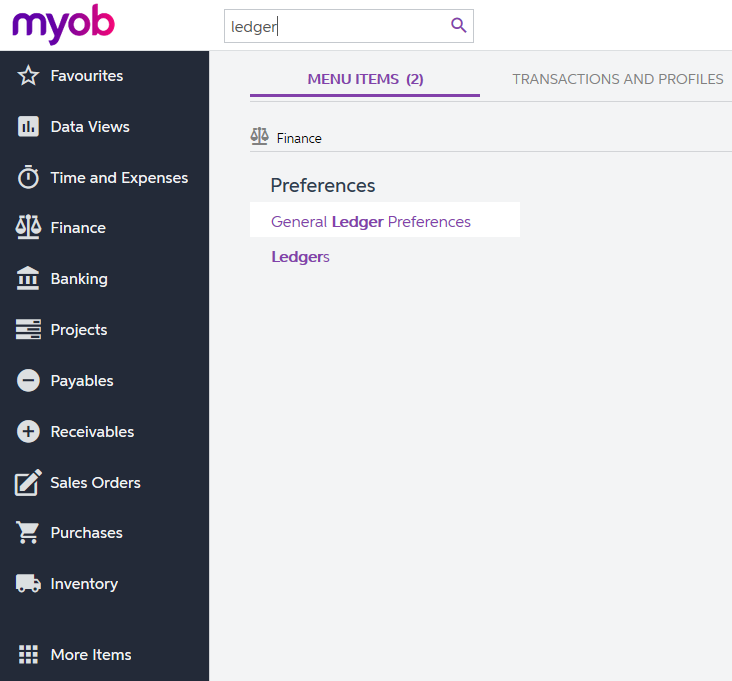


Figure: Searching for a form by title in the modern UI

* 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.

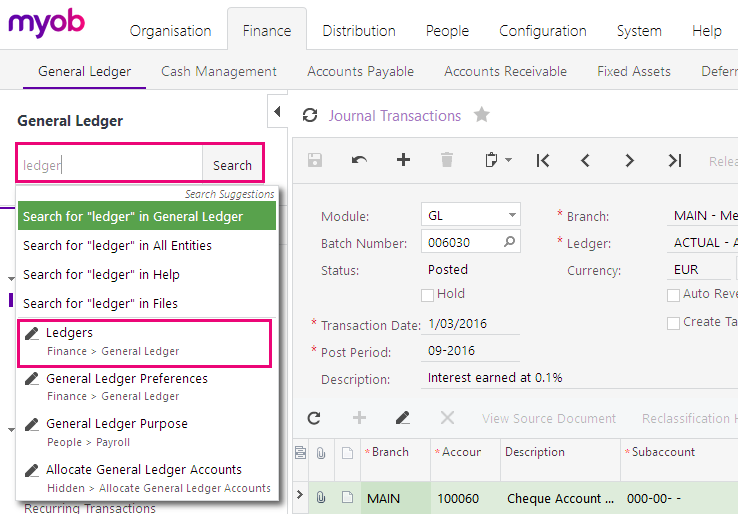


Figure: Searching for a form by its title in the classic UI

##### 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

1. 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.

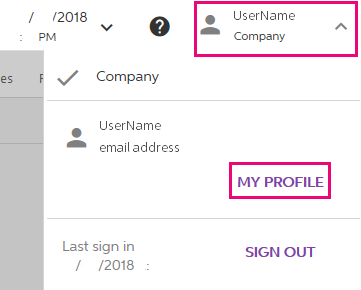


Figure: Opening the user profile

1. 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) |

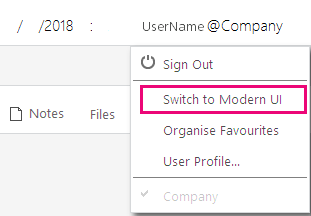


Figure: Switching to the modern UI

##### 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)

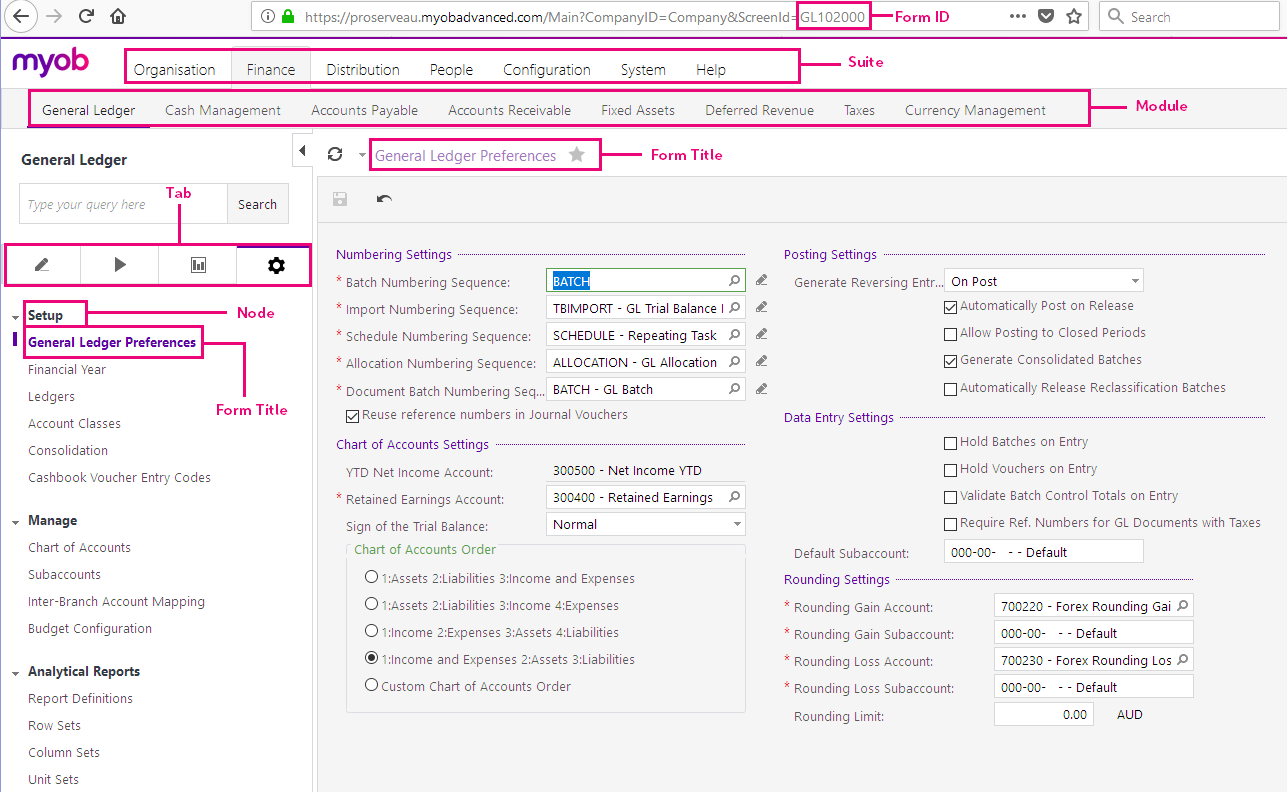


Figure: General Ledger Preferences form in the classic UI

# Product Features

Not all features are available in all MYOB Advanced Business Editions, for example as you can see from the following comparison chart, Custom Sales Order Types are only available in Enterprise Edition.

Contact your Business Partner for more information on the different Editions or if you want to add more features to Advanced Business.

## MYOB Advanced Business – Edition Comparison Chart

### Purchase Orders

|  |  |  |  |
| --- | --- | --- | --- |
| **Product Features** | **MYOB Advanced Business Edition** | | |
|  | Standard | Plus | Enterprise |
| Purchase Order Processing |  |  |  |
| Supplier Price Lists and Discounts |  |  |  |
| Landed Cost Calculation |  |  |  |
| Purchase Order Approval |  |  |  |
| Drop Ship Delivery |  |  |  |
| Purchase Requisition and Bid Management |  |  |  |
| Supplier Purchase Agreements (Blanket Orders) |  |  |  |

# Why do I need to know about purchasing?

To have stock to sell to customers business usually enter into a relationship with suppliers (vendors). These relationships can be formal, with signed purchasing agreements or informal, such as a quick phone call to see if the stock is available for delivery, or anything in-between.

Let’s look at how we manage purchasing and purchase orders in MYOB Advanced.

When we are ready to re-stock, a purchase order is usually raised and sent to our supplier; once the goods are received we update stock by releasing a purchase receipt; once the supplier’s invoice (bill) has been received we then pay for the stock according to the terms agreed with the supplier prior to the purchase order being raised.

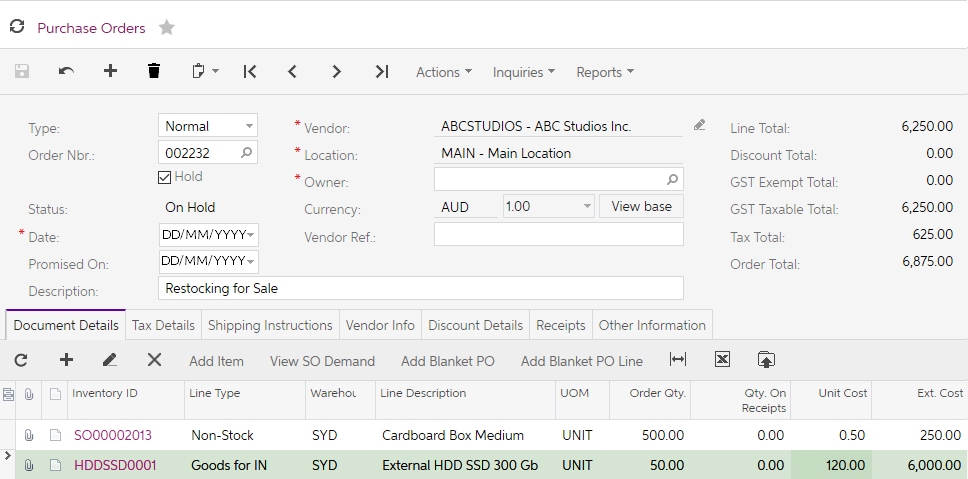


Figure: Purchase Order showing Stock and Non-stock items

In your training today, we are going to go over the purchase orders. Paying and managing our suppliers (vendors) will be covered in the Payables topic.

As MYOB Advanced is highly configurable, the features and processes may differ for your business. Please refer to your Business Partner for details on any customisations they may have included in your implementation.

# Where do I start?

The Purchase Orders module supports the following purchase order types in the Enterprise edition of MYOB Advanced: **Normal, Drop Ship, Blanket,** and **Standard.** The features that affect the list of order types (if not enabled) are: **Blanket and Standard Purchase Orders** and **Drop Shipments**. Orders of different types have different functionality and fulfilment flows; for instance, orders of the **Standard** type can be included in **Normal** orders.

Your MYOB Advanced will be implemented by a consultant who is Certified to Implement MYOB Advanced Business. As mentioned previously, MYOB Advanced is highly configurable, this training covers the basic business processes you need to know when purchasing stock.

## What do I need to know?

When businesses purchase stock they usually come to a formal or informal arrangement with one or more suppliers (vendors). We will cover the basic purchasing cycle in MYOB Advanced, should you want to know any additional information, please see the help pages of MYOB Advanced or ask your Business Partner.

To get to the Help Articles in the Modern UI, just type in your text in the search box on the top of the screen and then click on the Help Articles link.

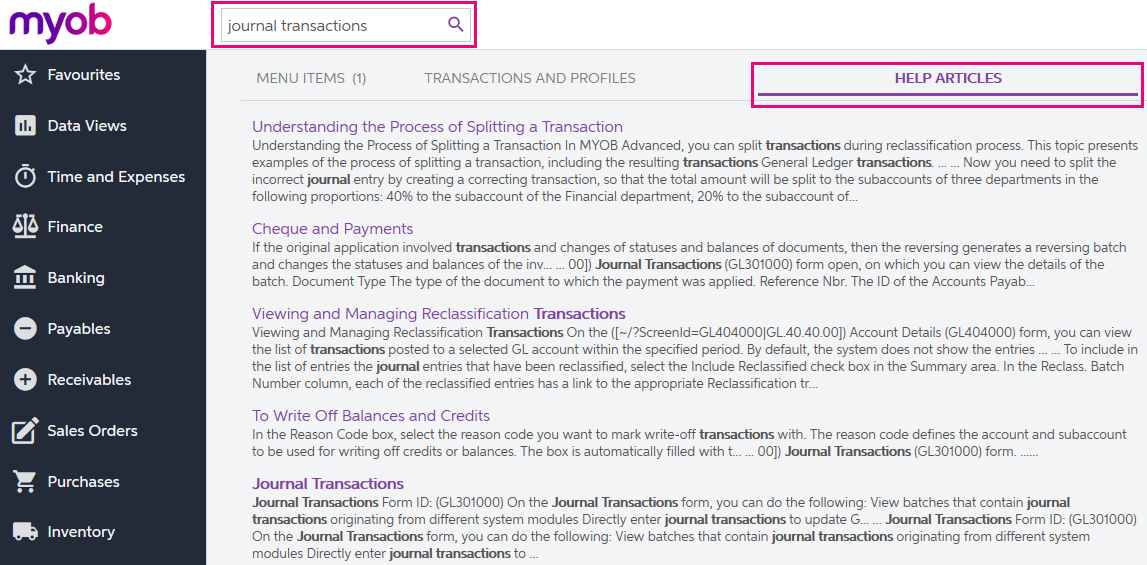


Figure: How to get to the Help Articles

## Purchase Order Preferences

Your implementing partner will go through and set up general settings for the Purchase Orders module, such as numbering sequences for purchasing documents, validation requirements for purchase orders and receipts, approval and mailing settings, and the default freight expense account and subaccount. These will be set in the **Purchase Order Preferences** form (PO101000) under Purchases > Preferences in the Full Menu.

You should only make changes to any settings preferences after talking to your Business Partner.

### Activity 1 – Purchase Order Preferences

1. Go to **Purchase Order Preferences** form (PO101000; Purchasing > Preferences) and review the settings.

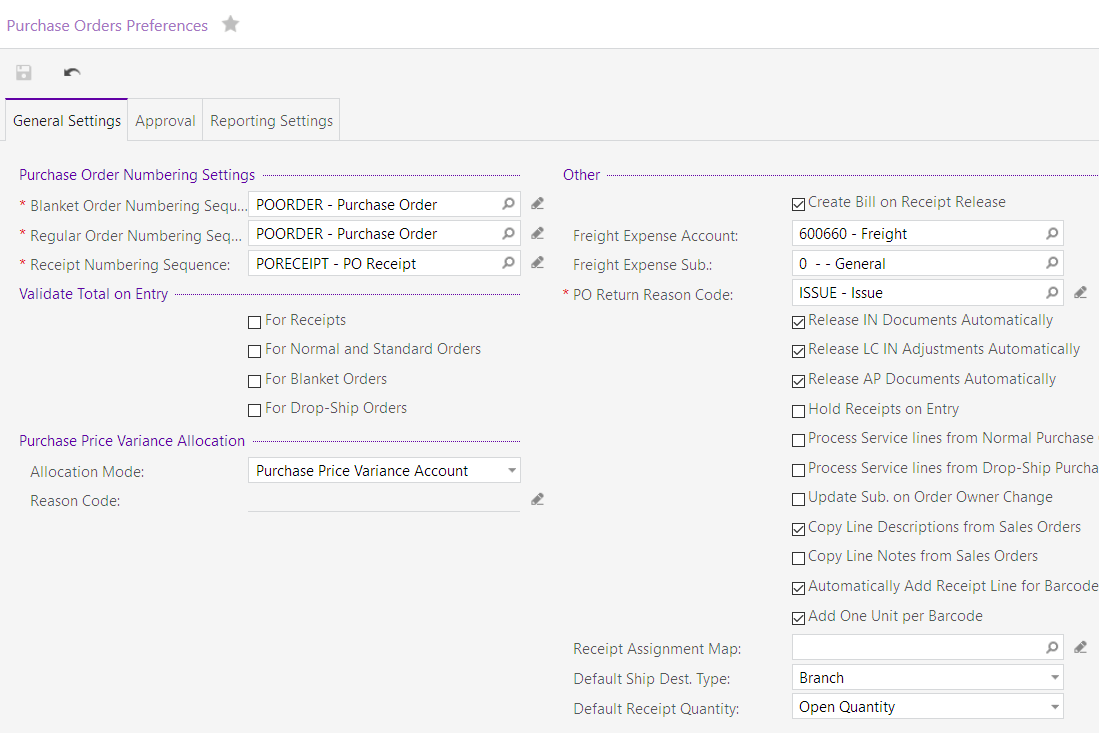


Figure: Purchase Order Preferences

The **General Settings** holds the default settings of the Purchase Order module.

* The **Validate Total on Entry** section holds the options to require validation of document totals. If the checkboxes are ticked for one or more document types, then a Control Total field will show on the summary section of the form. The Order Total and Control Total fields must be the same before you can save the document.

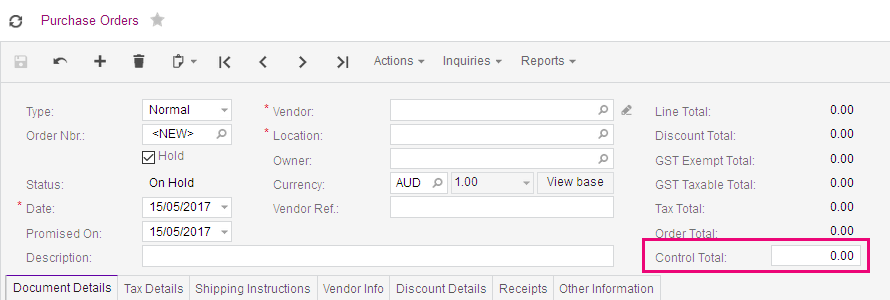
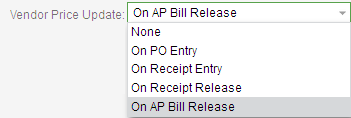


Figure: Purchase Order with Validate Total on Entry

The **Other** section holds the miscellaneous settings related to document processing, such as;

* **Create Bill on Receipt Release** checkbox. If you want to create the supplier bill (invoice) when the Purchase Receipt is released tick this box.
* **Release XX Documents Automatically;** When one or more of the three checkboxes are ticked, the inventory and Accounts Payable documents will be released once the Purchase Order documents have been released.
* **Vendor Price Update:**

## 

## Approval

*Outside the scope of this course.*

The **Approval** tab is shown when the **Approval Workflow** feature is enabled. If you would like this feature for your business contact your Business Partner.

## Mailing Settings

*Outside the scope of this course.*

The **Mailing Settings** tab is where you can list the predefined mailings used for sending purchase orders to suppliers by email.

## Landed Costs Codes

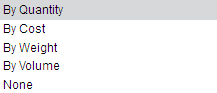
You can add or modify landed cost codes used in your business on the **Landed Cost Codes** form (PO202000). These costs are additional costs for delivering goods to your warehouses or customer locations if the goods are drop-shipped.

The type of the landed cost can be;

* **Freight & Misc. Origin Charges**: freight expenses and other origin-related charges.
* **Customs Duties**: customs duties paid for the purchased goods.
* **GST Taxes:** GST taxes.
* **Misc. Destination Charges**: miscellaneous destination charges.
* **Other**: any other type.

The **Application Method:**  The costs can be on added to an Accounts Payable bill or on a purchase receipt; or on both documents.

As well as choosing the **Application Method,** you also choose the **Allocation Method**. This spreads the costs across the stock.

You choose from:

## FOB Points

*Outside the scope of this course.*

**FOB** means **freight on board** or **free on board**. To the **FOB Points,** the supplier delivers the goods and pays for the freight. The freight and other expenses from that point becomes the customer’s cost.

## Ship Via Codes

*Outside the scope of this course.*

You use the **Ship Via Codes** form (CS207500), to maintain information about carriers you use for shipping goods and your shipping options. A **ship via code** shows a way to ship goods to customers.

# Master Records

As part of your implementation, your Business Partner will configure MYOB Advanced and import master records such as **Suppliers** (Vendors). Once you are working with MYOB Advanced, you will need to be able to add to these records when stock is purchased from new suppliers.

## Accounts Payable Preferences

The **Payables** module is defined on this form (AP101000). You can specify the default supplier class associated with the **Accounts Payable** module, to provide some default settings when a new supplier is added.

We will go over the full **Payables** module during our **Finance** training, for now we will look at this module’s role with the **Purchase Orders** module of the **Inventory** suite.

### Activity 2 –Payables Preferences

1. Go to the **Accounts Payable Preferences** form (AP101000; Payables > Preferences and review the settings.

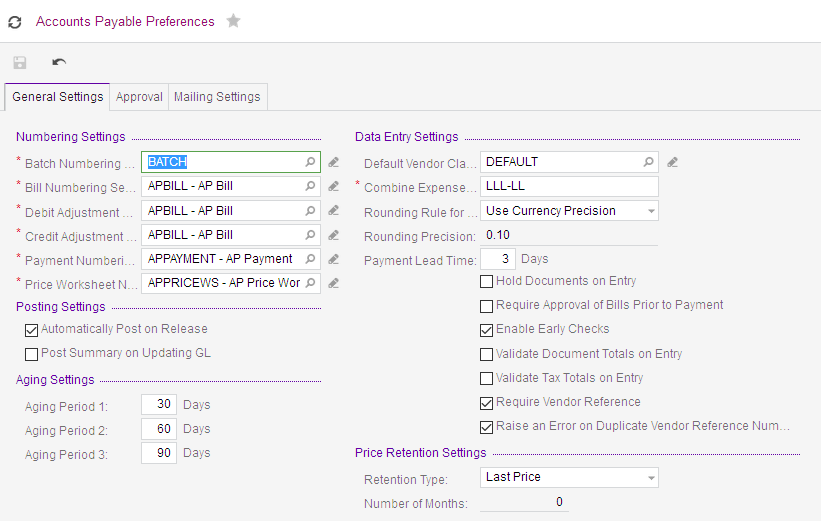


Figure: Accounts Payable Preferences – General Settings tab

To raise a purchase order for stock, a supplier must already be in the **Payables** module.

### Activity 3 – New Supplier (Vendor)

1. Go to the **Suppliers** form (AP303000; Payables > Profiles and add a new supplier with the following settings and then save your changes;

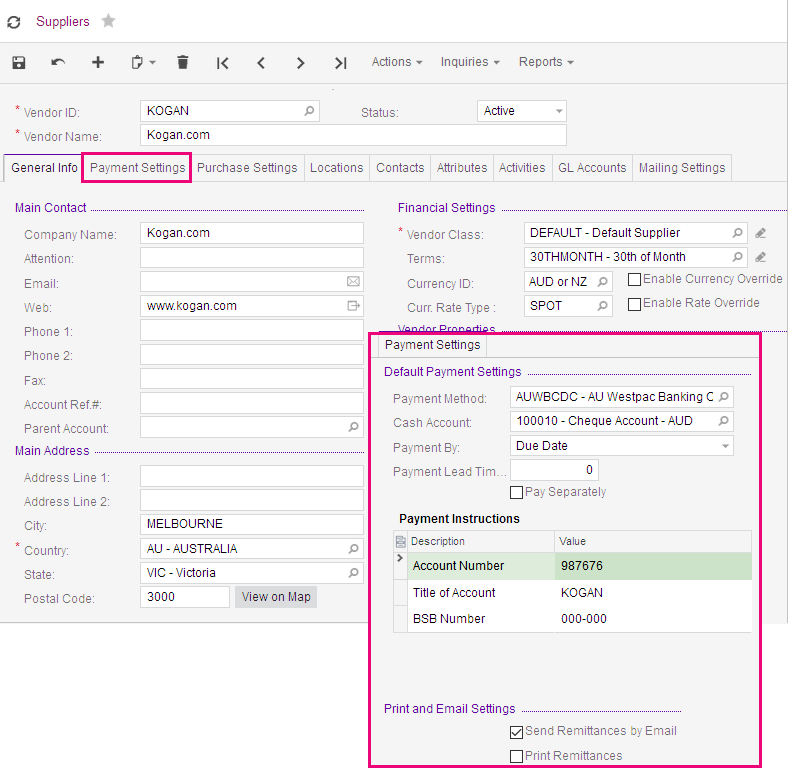


Figure: Supplier

1. Go to the **Locations** tab and add a new location by clicking on the **Add Location** button. Update the new location with the following details;

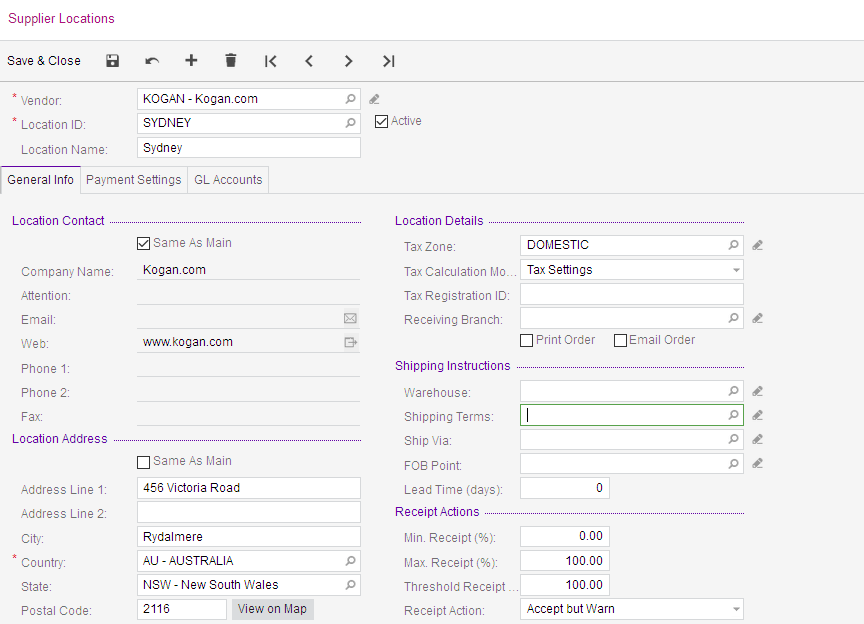


Figure: Supplier Location for Sydney – General Info tab

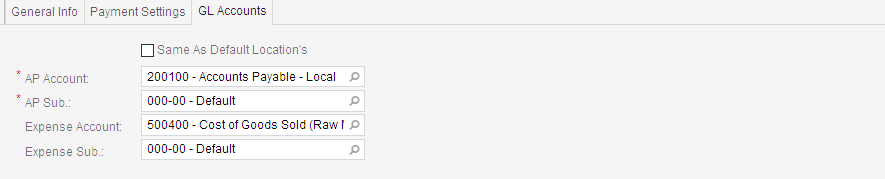


Figure: Supplier Location tab for Sydney - GL

We will let the **Supplier Class,** **DEFAULT** update the record.

The defaults that will come from the supplier class are shown below:

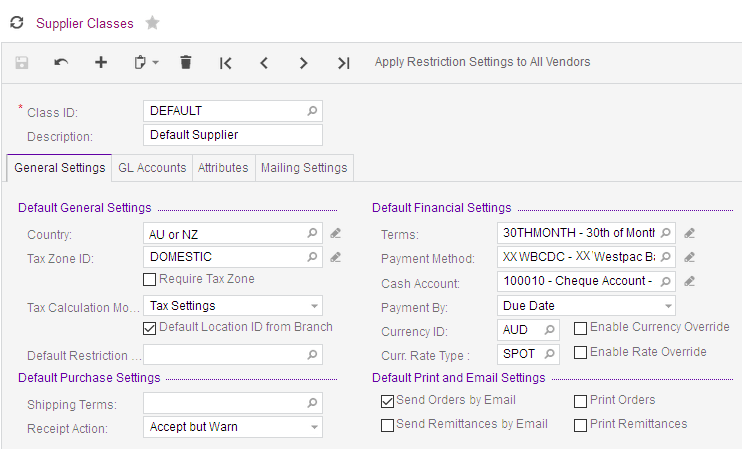


Figure: Default Supplier – General Settings tab

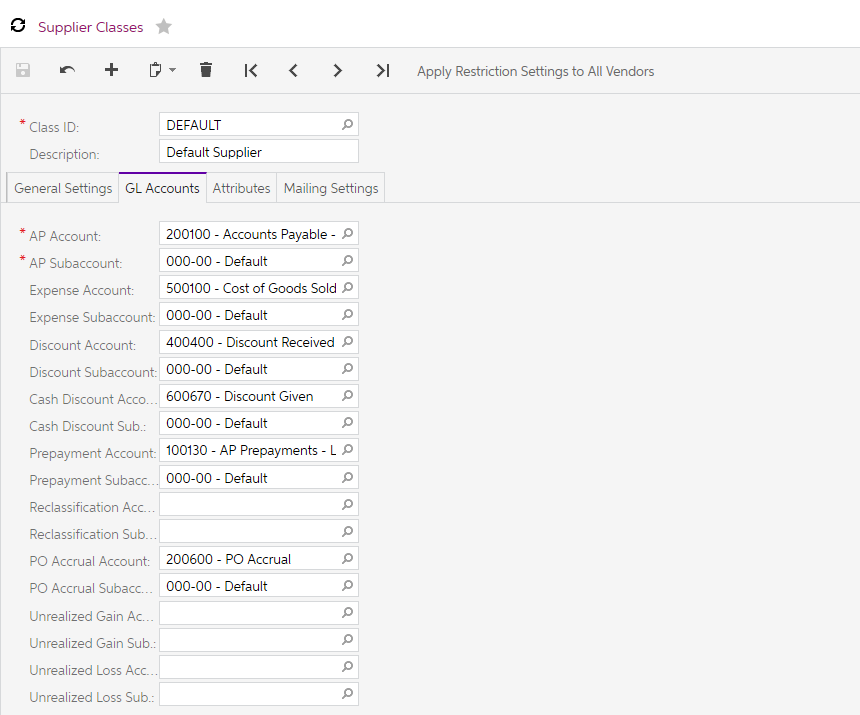


Figure: Default Supplier – GL Accounts tab

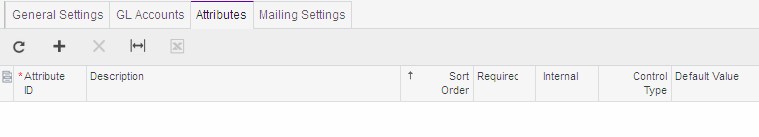


Figure: Default Supplier – Attributes tab

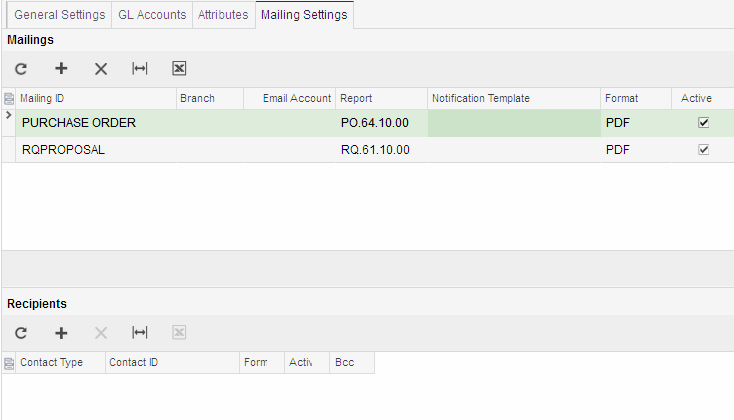


Figure: Default Supplier – Mailing Settings tab

## Manage Supplier Inventory

Once you have created your supplier, you can update the prices for stock and/or non-stock items that you will be purchasing from them. You also have been offered discounts for purchasing the **CPU00001- 3.6GHz es 1 Processor** and **Optiflex D0**100.

### Activity 4 – Supplier Prices

1. Open the **Supplier Prices** form (AP202000; Payables > Profiles) and enter the following information, then **Save** your changes:

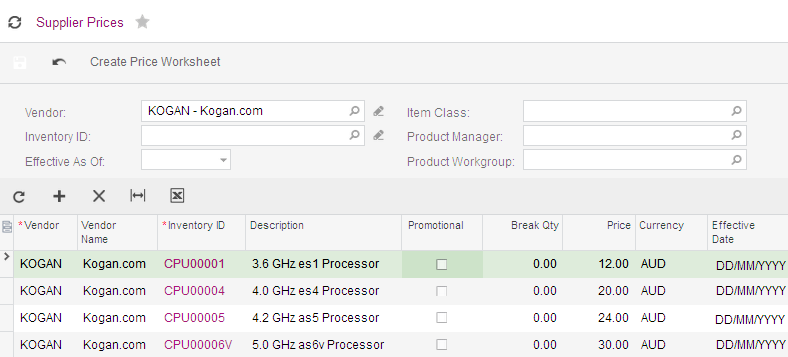


Figure: Supplier Prices for Kogan

### Activity 5 – Supplier Discount Codes

1. Open the **Supplier Discount Codes** form (AP204000; Payables > Preferences) and enter the following information, then **Save** your changes:

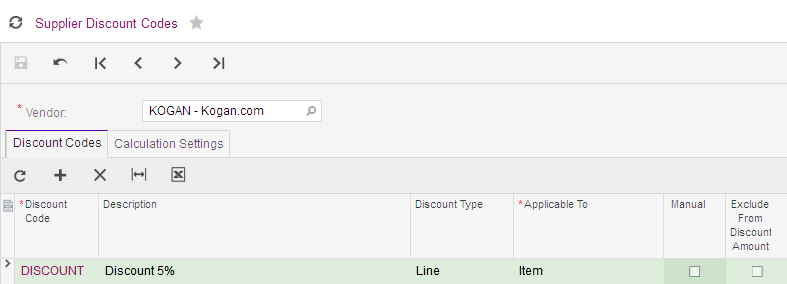


Figure: Supplier Discount Code tab

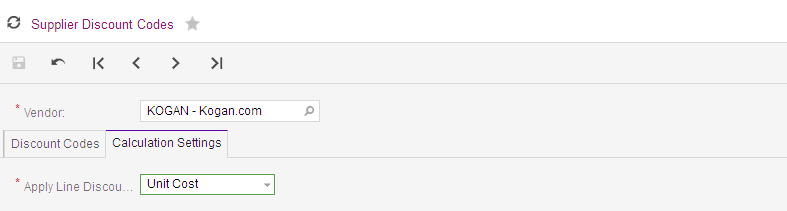


Figure: Supplier Discount Code – Calculation Settings

### Activity 6 – Supplier Discounts

1. Open the **Supplier Discounts** form (AP205000; Payables > Profiles), then enter the following information and **Save** your changes:

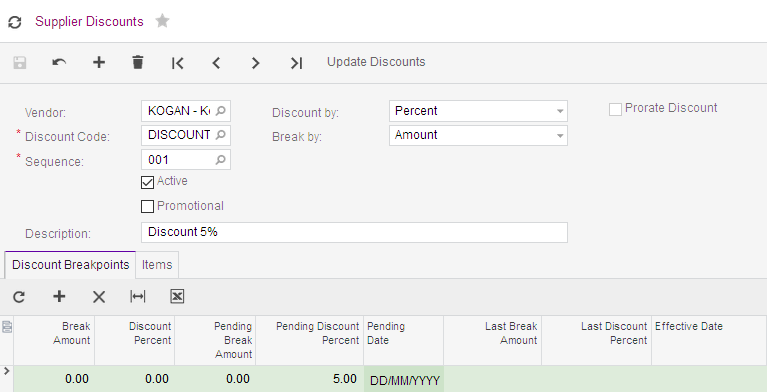


Figure: Supplier Discounts – Discount Breakpoints tab

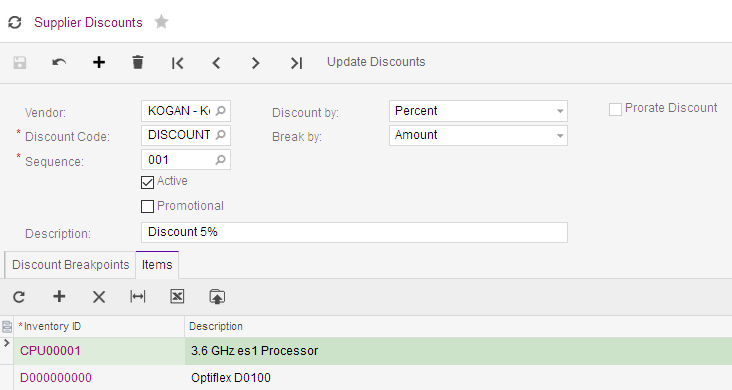


Figure: Supplier Discounts – Items tab

1. From the toolbar, click **Update Discounts**. The **Pending Discount Percent** becomes **0.00** and the **Discount Percent** is updated with **5.00** as shown below.

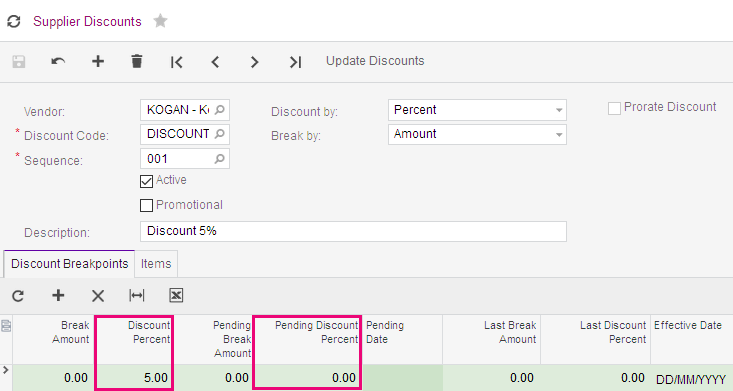
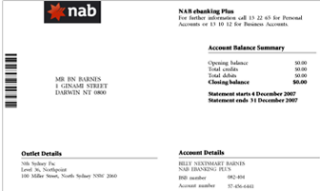


Figure: Supplier Discounts after Update Discounts

# Purchasing











**Landed Costs**

Figure: Purchase Order Cycle

The Purchases module helps you organise and control the purchasing process, plan purchasing expenses and reduce spending on goods and services. Advanced Business automates the purchasing process: issuing purchase orders, receiving orders and creating Payables bills. With the Purchases module, you gain complete visibility into the whole purchasing process, from planning purchases to paying the bills.

In our training, we will be going through the purchase cycle, covering all the above steps except for the AP Payment which is covered in the Payables topic.

As mentioned previously, MYOB Advanced is highly configurable, and not all functions are available in all MYOB Advanced Business editions; for example, Drop Ship Delivery are only available in the Plus and Enterprise Editions.

### Activity 7 – Purchase Orders

1. Open **Purchase Orders**; Purchasing > Transactions.
2. On the **Purchase Orders** search form (PO3010PL); click on the add new record  button on the form toolbar and enter the following purchase order, then **Save** your changes.

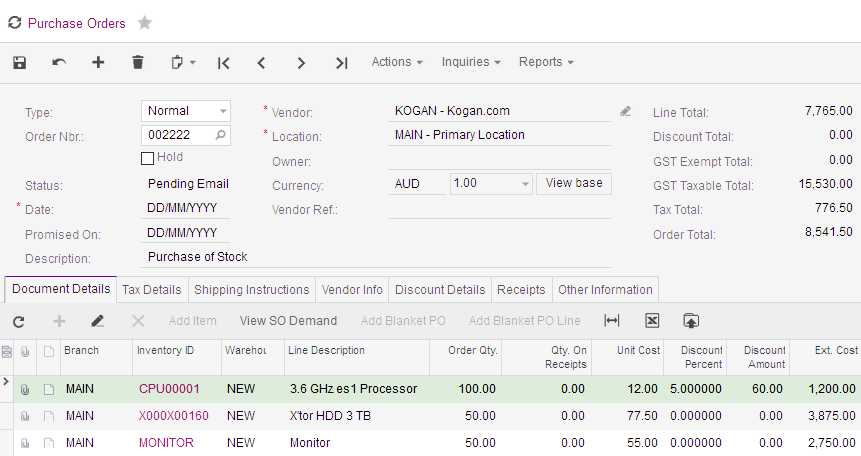


Figure: Purchase Order ready to be emailed.

1. Go to the **Tax Details** tab and review the tax assigned to the purchase order. All the stock being purchased should be assigned to the **Tax ID** of **G11NONCAP GST**. Make any changes to the purchase order on the **Tax Details** tab, then untick the **Hold** checkbox and **Save** your changes

Under the  dropdown list on the form toolbar the following functions are available.



Figure: Functions available under the Action dropdown list

* **Approve:**  if the **Approval Workflow** is enabled you click on this to approve the purchase order.
* **Reject:** if the **Approval Workflow** is enabled you click on this to reject the purchase order. The purchase order can then be put **On Hold** and changes can be made. Once the changes are finished the purchase order can then be re-sent for approval.
* **Email Purchase Order:**  to email the purchase order to the supplier.
* **Mark as Do Not Email:** This function is connected to the Don’t Email checkbox on the Other Information tab of the purchase order. Selecting this action will tick this checkbox.
* **Enter PO Receipt:** once stock is received you create a purchase receipt by selecting this action. A new *Purchase Receipts* form (PO302000) is opened and all the information on the purchase order copied to the new purchase receipt.
* **Enter AP Bill:** you create an **Accounts Payable Bill** by selecting this action. A new *Bills and Adjustments* form (AP301000) is opened and all the information on the purchase order is copied.
* **Complete Order:** if you are not going to receive any more stock on the purchase order the order can be completed by this action.
* **Cancel Order:** select this action if you want to cancel the purchase order and have the status changed to **Cancelled.**
* **Recalculate Prices:** this action opens a dialogue box where you can refresh both prices and discounts.
* **Create Prepayment:** this action opens the *Bills and Adjustments*form (AP301000) with a new prepayment request. The prepayment can be used to pay for the order.

1. From the **Actions** dropdown list select . Now go to the Other Information tab and review the checkboxes **Don’t Print** and **Don’t Email**, they should both be ticked.

### Activity 8 – Create a Purchase Receipt

1. From the **Purchase Orders** form (PO301000); select **Enter PO Receipt** from the **Actions** dropdown list, as all the stock has arrived two days after the purchase order was emailed to the supplier.

A new **Purchase Receipt** form (PO302000) with the type of **Receipt** has been created and the information on the purchase order copied.

On a purchase receipt, you can:

* Add stock not shown on the receipt.
* Add another **Normal** or **Drop-Ship** purchase order
* Add lines from another **Normal** or **Drop-Ship** purchase order
* Change the quantity received
* Change the cost of the stock
* Allocate stock by locations, lot/serial numbers and expiry dates.
* Add landed costs on the **Landed Costs** tab.

1. On the purchase receipt summary, enter the **Vendor Ref**. **123456**



Figure: Purchase Receipt with Create Bill ticked and Vendor Ref; added

When our purchase order preferences were set, the option **Create Bill on Receipt Release** was turned on. Our purchase receipt has the **Create Bill** checkbox ticked by default so once the purchase receipt is released the AP Bill will be created automatically.

1. Untick the **Hold** checkbox and **Save** your changes. The purchase recept will now have a **Status** of **Balanced.**
2.  the receipt from the form toolbar. Once the receipt has been released the stock will be updated to the warehouse and location, the stock value will be updated based on the valuation method on the stock item. An AP Bill will also be released as shown below.

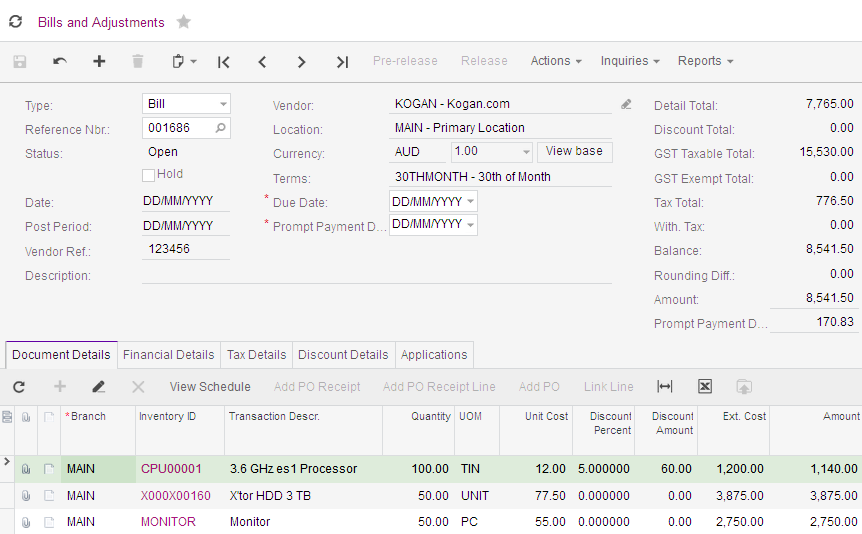


Figure: AP Bill create on purchase receipt release

## Landed Costs

The cost of goods purchased should include both the purchase price and additional charges, such as freight or other shipping costs and insurance. For an international shipment, it may also include customs duties and other taxes. All these charges are referred to as **landed costs** and add to the product cost.

In MYOB Advanced, you can have landed cost codes that depend on specific items, or on items’ weight or volume. Some landed costs may be known in advance, others are known only when the items are received at the destination warehouse.

There are 5 default **Landed Cost Codes** in MYOB Advanced,

* Customs Duty by Cost
* Freight by Quantity
* Freight by Volume
* Freight by Weight
* Other

To see how costs are increased by adding landed cost to goods purchased we will add a new stock item.

### Activity 9 – Stock Item

1. Open **Stock Items**; Inventory > Profiles.
2. On the **Stock Items** search form (IN2025PL); click on the add new record  button on the form toolbar and enter the following information and **Save** your changes.

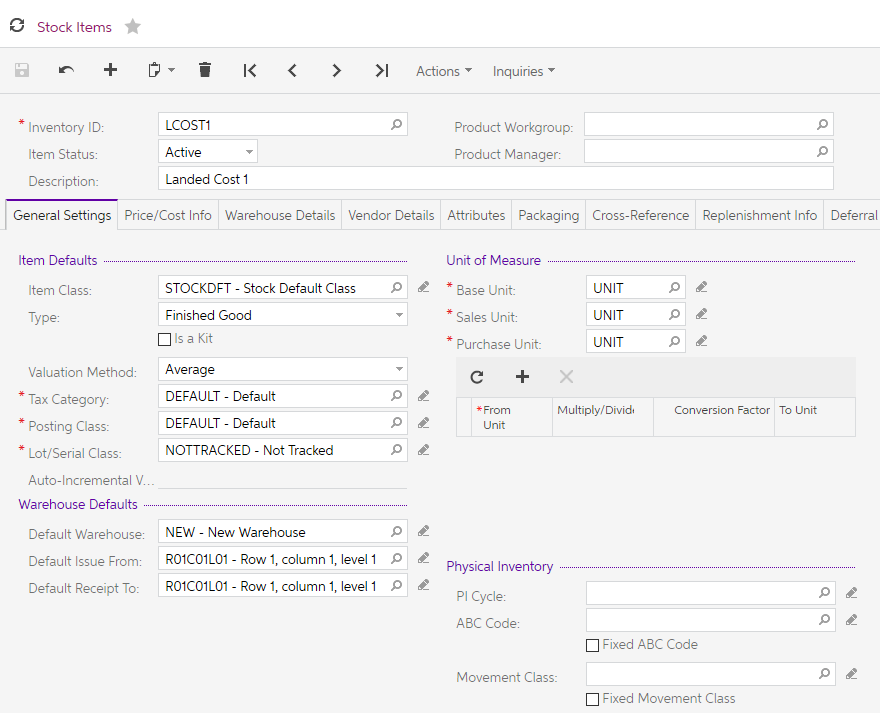


Figure: Stock Item

### Activity 10 – Landed Costs 1 – Receipt without Purchase Order

1. Open the **Purchase Receipt** form (PO302000; Purchases > Transactions) and enter the following information. All the stock being purchased should be assigned to the **Tax ID** of **G11NONCAP GST**. Make any changes to the purchase receipt on the **Tax Details** tab, then **Save** your changes.

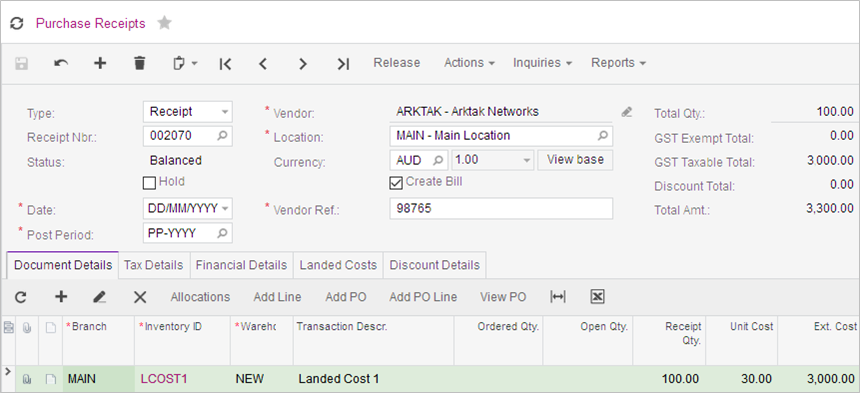


Figure: Purchase Receipt document details tab

1. On the Landed Costs tab enter the freight costs from the supplier Computer Environment Solution. We will be using the **Landed Cost Code: FRTBYQTY**.



Figure: Freight invoice received for LCOST1 stock.

Your purchase receipt should look like the screenshot below once you have updated this from the document.

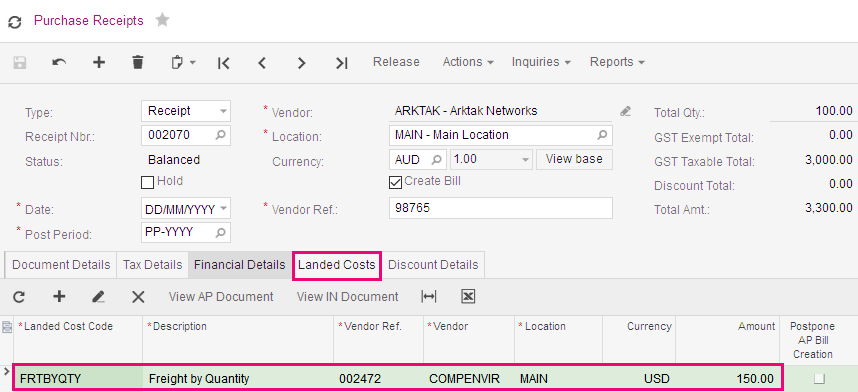


Figure: Freight by Quantity entered on Landed Cost tab.

1. Now **Release** the purchase receipt, the AP Bills will be created automatically.

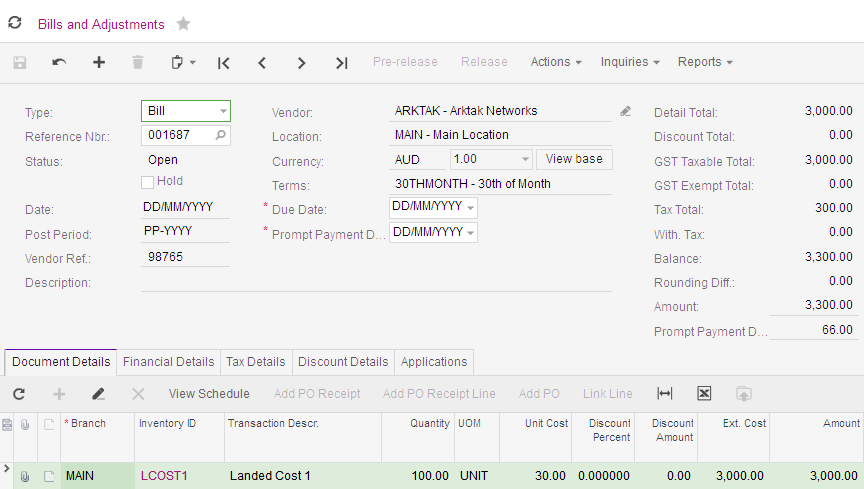


Figure: AP Bill for LCOST1 Stock

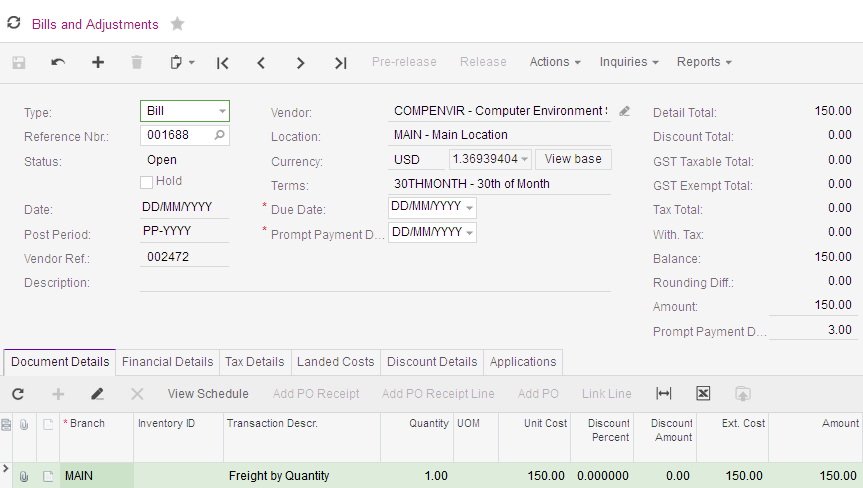


Figure: AP Bill for Landed Cost (freight)

1. Let’s go to the **Inventory Transaction Details** form (IN404000; Inventory > Inquiries) and review the transactions for our LCOST1 stock item.

As shown below, line 1 shows the freight cost of USD150.00 converted to AUD205.41 with an adjustment created for the landed cost. Line 2 is the purchase receipt.

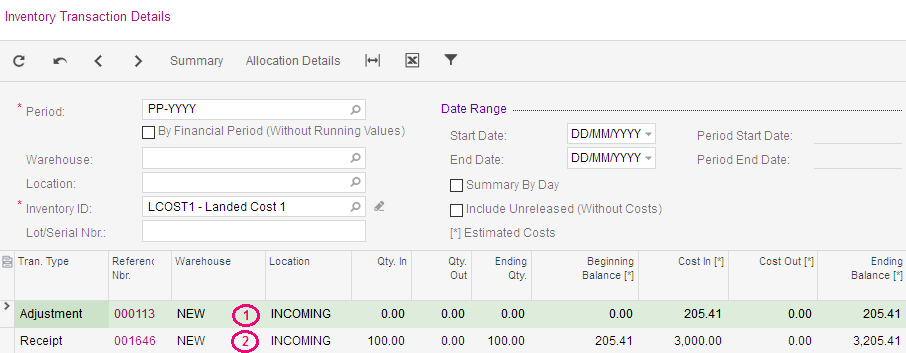


Figure: Inventory transactions created for LCOST1 stock

1. Now let’s go to the **Price/Cost Info** tab on the **Stock Item** form (IN404000); and review the **Cost Statistics** for LCOST1 stock item.

The **Average Cost**: has been updated to 32.05, 30.00 cost charged by the product supplier plus 2.05 charged by the freight supplier for each stock item. If we were to order this stock again the stock line on the purchase order will show 30.00 only, which is the **Last Cost**.

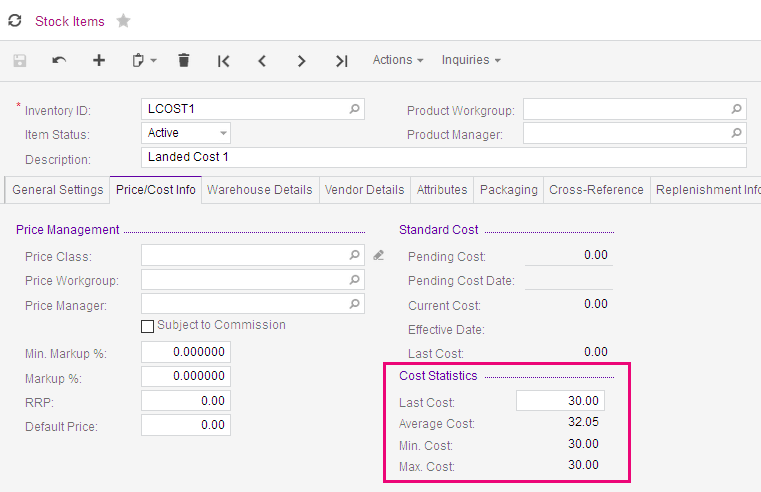


Figure: Cost Statistics for LCOST1

### Activity 11 – Stock Item

1. Open the **Stock Item** form (PO302000 and enter the following information, then **Save** your changes.

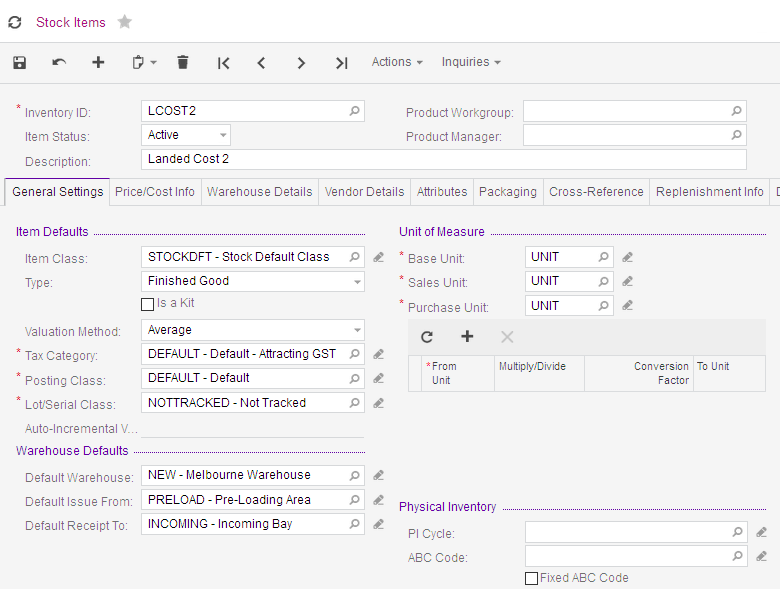


Figure: New Stock Item

### Activity 12 – Landed Costs 2

With this Landed Cost example, we will add the expected cost to the purchase receipt then postpone creating the AP Bill for the Landed Cost until the invoice is received from the freight supplier.

1. Add a new **Purchase Order** (PO302000).
2. Enter the following information.

All the stock being purchased should be assigned to the **Tax ID** of **G11NONCAP GST**. Make any changes to the purchase order on the **Tax Details** tab, untick the **Hold** checkbox, then **Save** your changes.

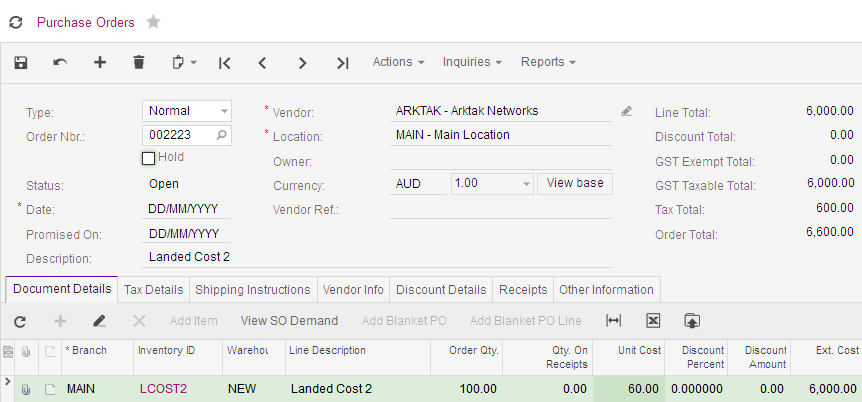


Figure: New Purchase Order

1. From the **Actions** dropdown list select **Enter PO Receipt**. When the purchase receipt is displayed, check the **Tax Details**

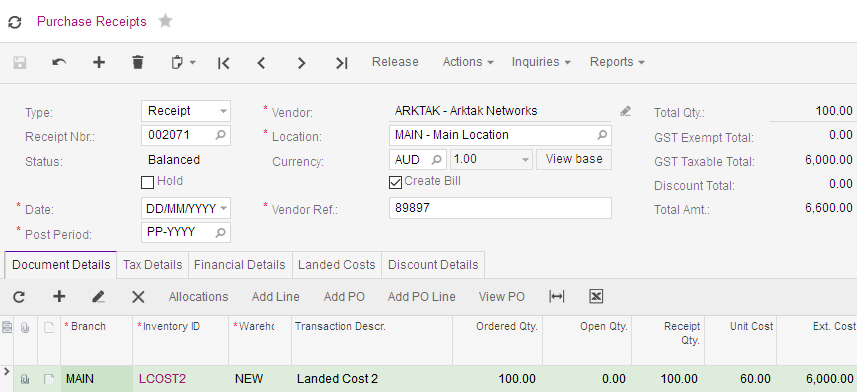


Figure: Purchase Receipt

1. Enter the expected freight costs on the Landed Costs tab as shown below. Make sure the checkbox **Postpone AP Bill Creation** is ticked. Then **Release** the purchase receipt from the form toolbar.

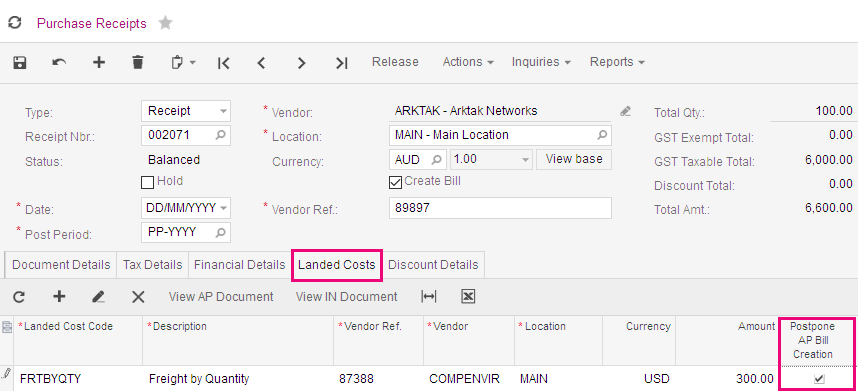


Figure: Purchase receipt with landed costs AP bill postponed

1. Open the **Bills and Adjustments** form (AP301000; Payables > Transactions) and create a bill for the postponed landed costs on the stock item LCOST2 by selecting the **Landed Costs** tab. Then selecting the **Add Postponed Landed Cost** action on the grid toolbar as shown below.

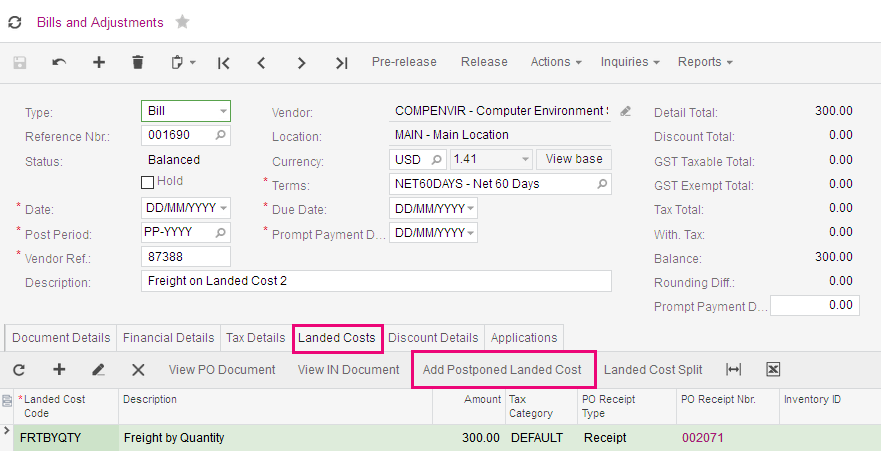


Figure: Bill with postponed landed costs added.

A dialogue box will appear, select the postponed landed cost then .

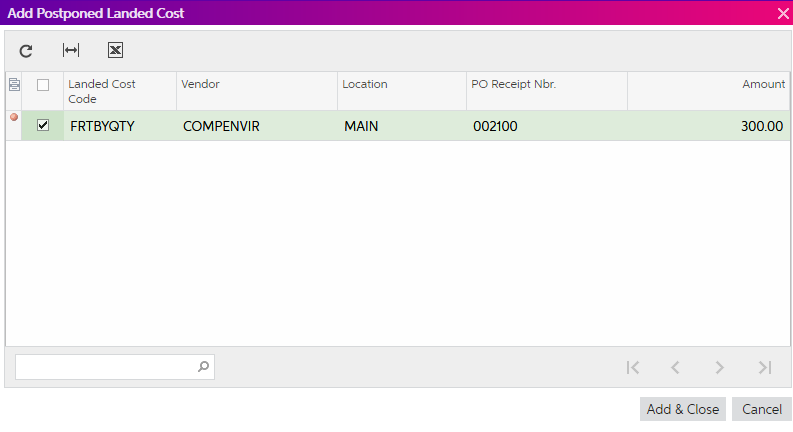


Figure: Add Postponed Landed Cost dialogue box

1. **Release** the bill.
2. Let’s go to the **Inventory Transaction Details** form (IN404000; Inventory > Inquiries) and review the transactions for our LCOST2 stock item.

As shown below, line 1 shows the freight cost of USD300.00 converted to AUD410.82 with an adjustment created for the landed cost. Line 2 is the purchase receipt.

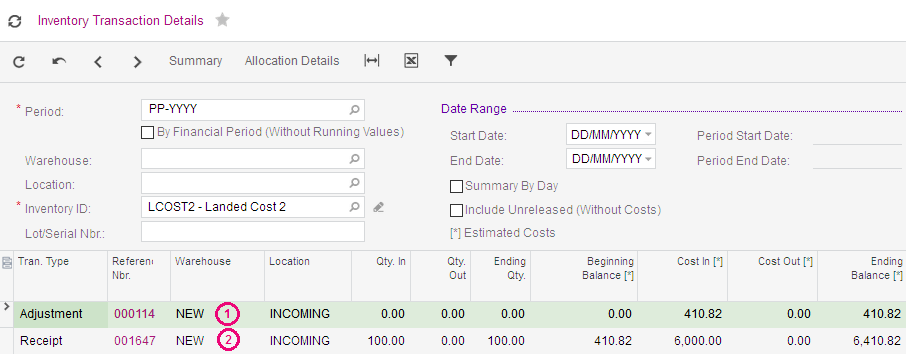


Figure: Inventory transactions created for LCOST2 stock

1. Now let’s go to the **Price/Cost Info** tab on the **Stock Item** form (IN404000); and review the **Cost Statistics** for LCOST2 stock item.

The **Average Cost**: has been updated to 64.11, 60.00 cost charged by the product supplier plus 4.11 charged by the freight supplier for each stock item. If we were to order this stock again the stock line on the purchase order will show 60.00 only, which is the **Last Cost**.

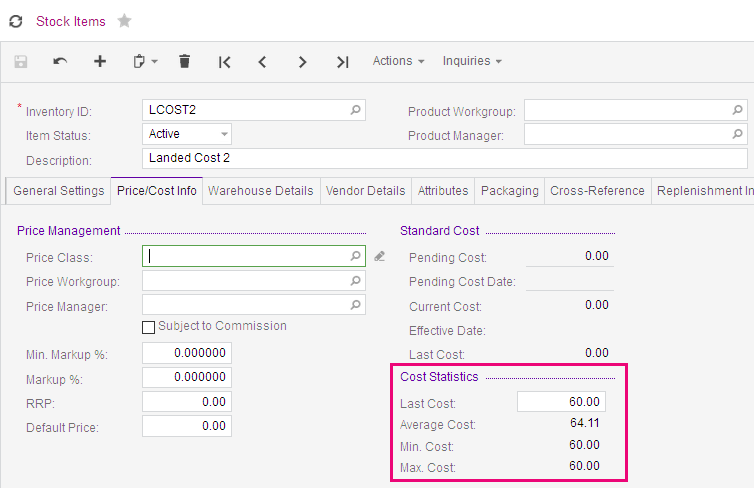


Figure: Cost Statistics for LCOST1

## Receipting Multiple Purchase Orders

### Activity 13

1. Add a new **Purchase Order** (PO302000) and enter the following Purchase Order for **Arktak Networks,** take the purchase order off hold and **Save**.

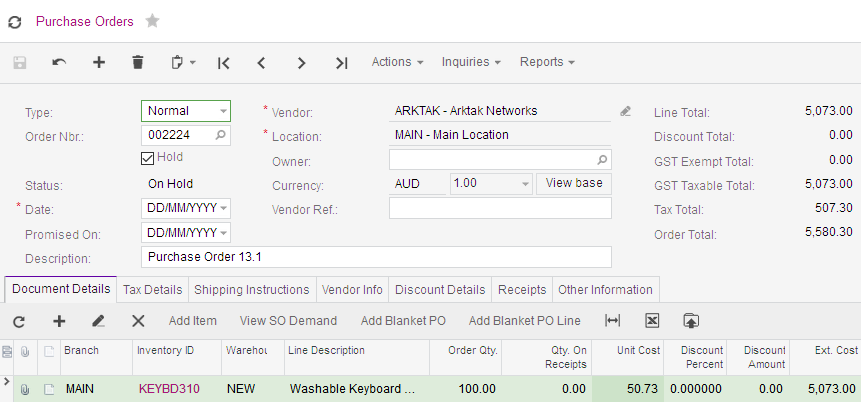


Figure: Purchase Order 13.1

1. Now enter the following purchase order also for **Arktak Networks**, take the purchase order off hold and **Save.**

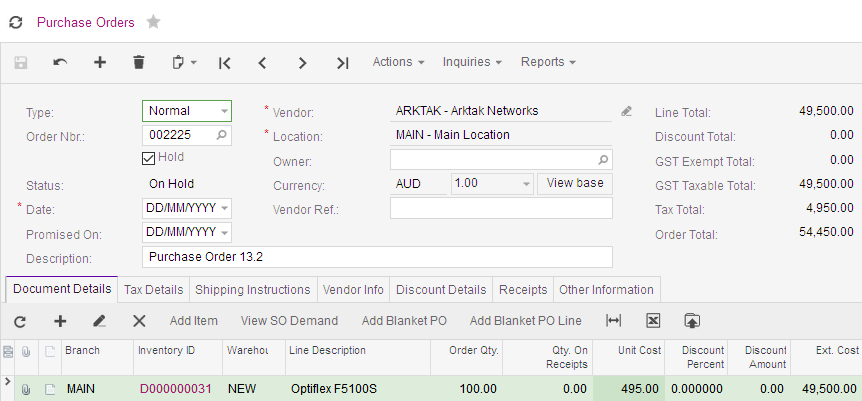


Figure: Purchase Order 13.2

1. Open the **Purchase Receipts** form (PO302000; Purchases Orders > Transactions), select **Add PO** and select both the purchase orders then **Add & Close.**

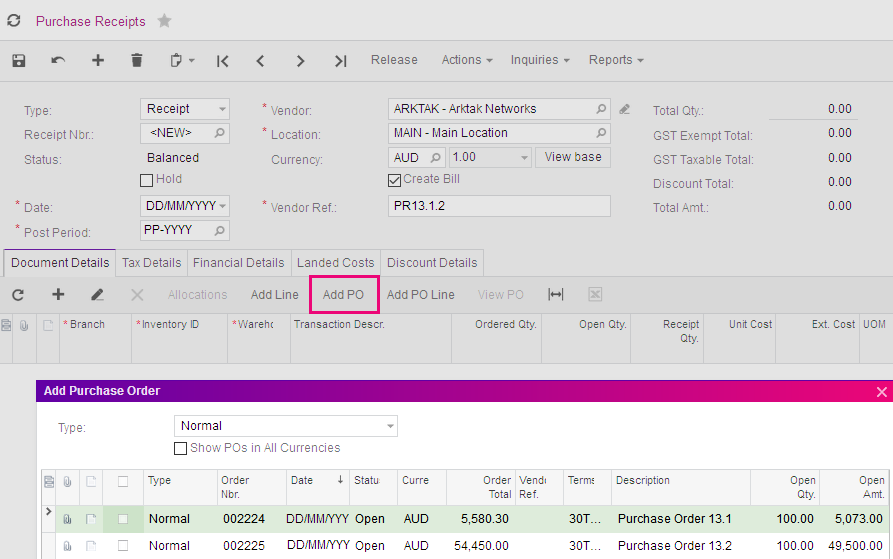


Figure: Purchase Receipt for multiple POs

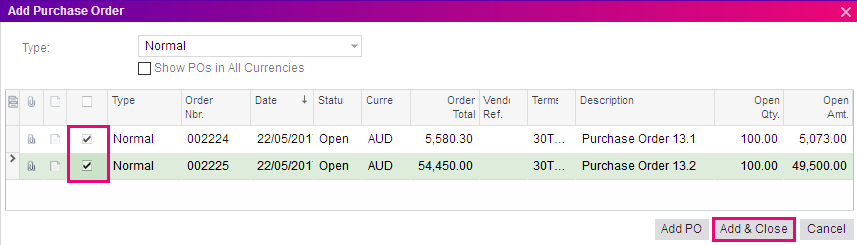


Figure: Add Purchase Order dialogue box.

Once you have the two lines on the purchase receipt, **Release** the receipt.

## Returning faulty goods

The delivery received from Arktak Networks had 5 faulty items, they need to be returned to Arktak.

### Activity 14

1. Open the **Purchase Receipts** form (PO302000). Change the **Type:** from **Receipt** to **Return.**
2. Enter a **Purchase Return** as per the following details.

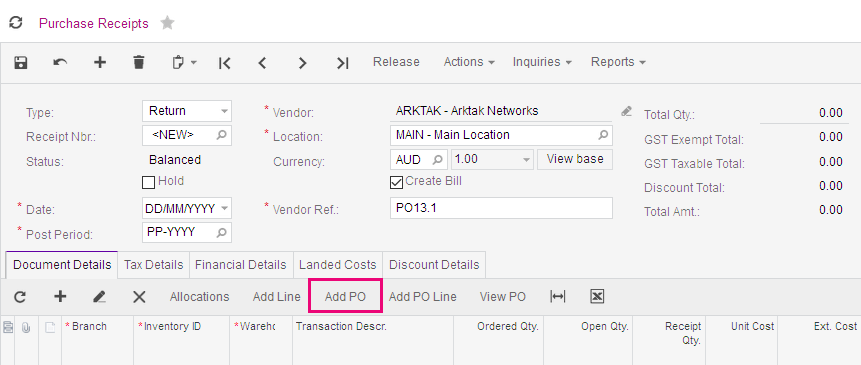


Figure: Purchase Return

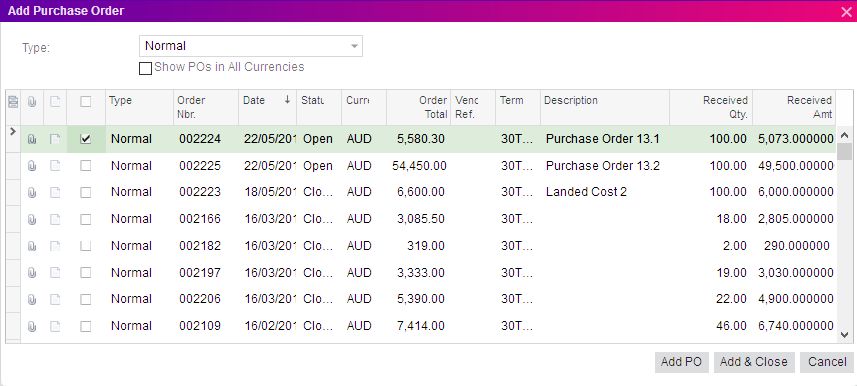


Figure: Add Purchase Order dialogue box.

1. Change the Receipt Qty. to 5 as we are send back 5 keyboards only. Then **Release** the purchase return.

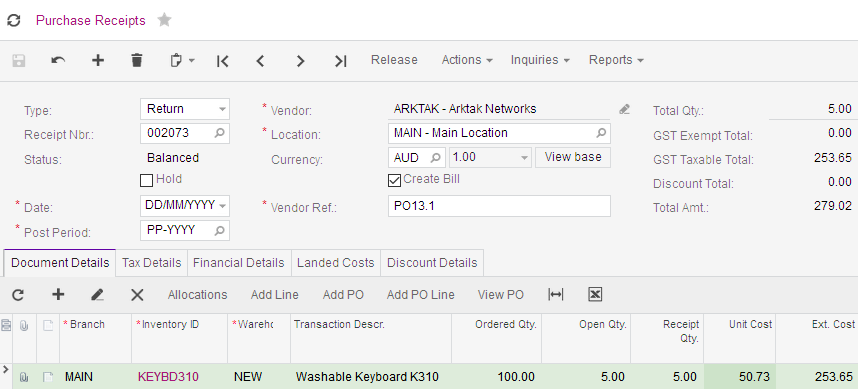
****

Figure: Purchase Return of 5 keyboards.

1. When the purchase receipt has been released, MYOB Advanced will create a Debit Adj. as shown below.

Navigate to the **Bills and Adjustments** form (AP301000) and find the debit adjustment that was created.

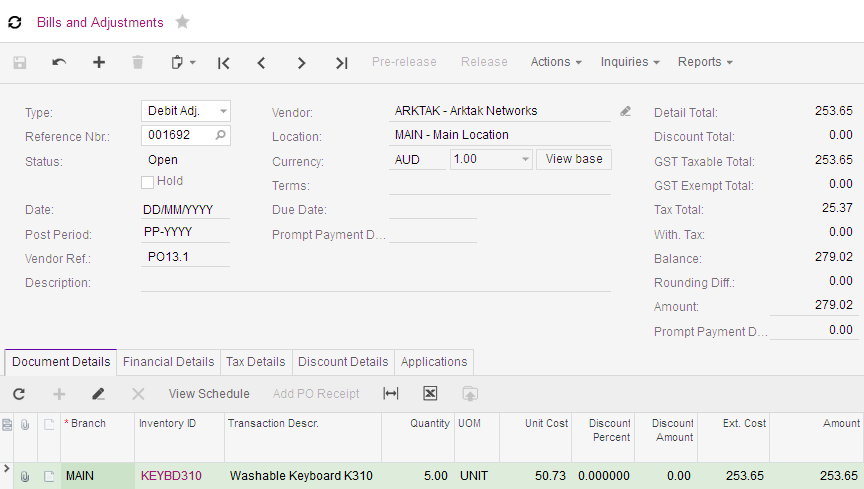


Figure: Debit Adj. created on release of purchase return.



**MYOB Advanced**

AU-004 – Sales Orders

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ABN 13 086 760 198

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# 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.

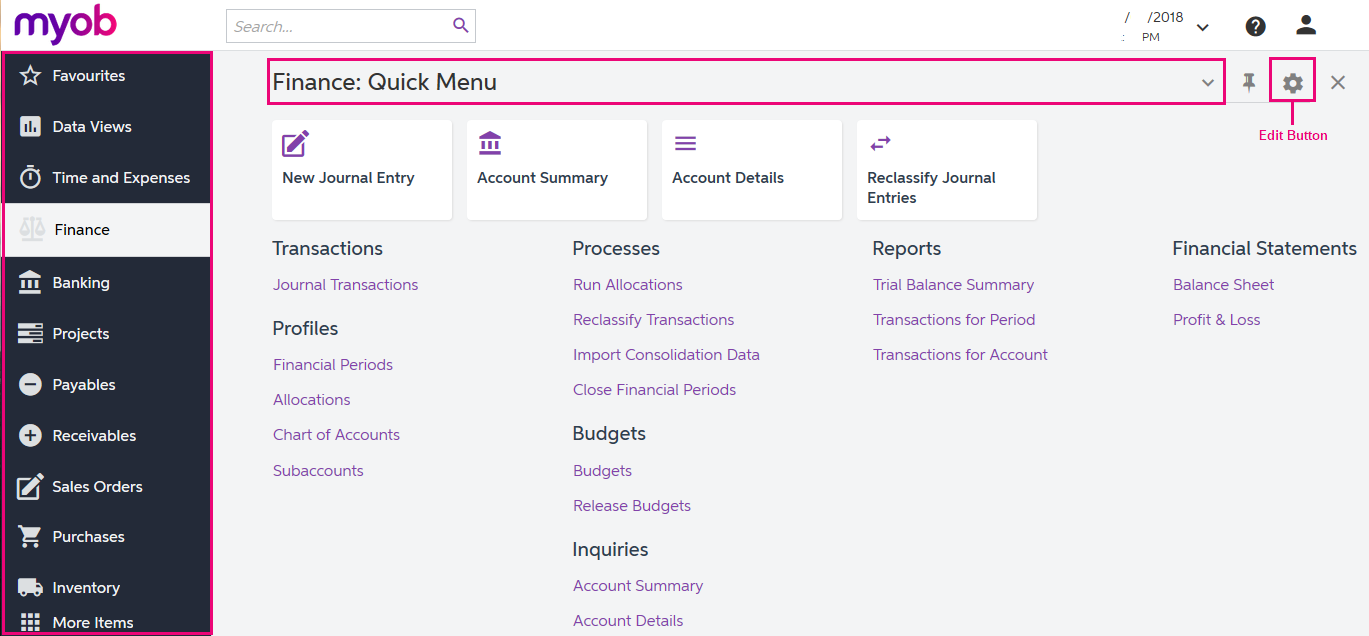


Figure: Navigating to a form from a Quick Menu

##### 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).

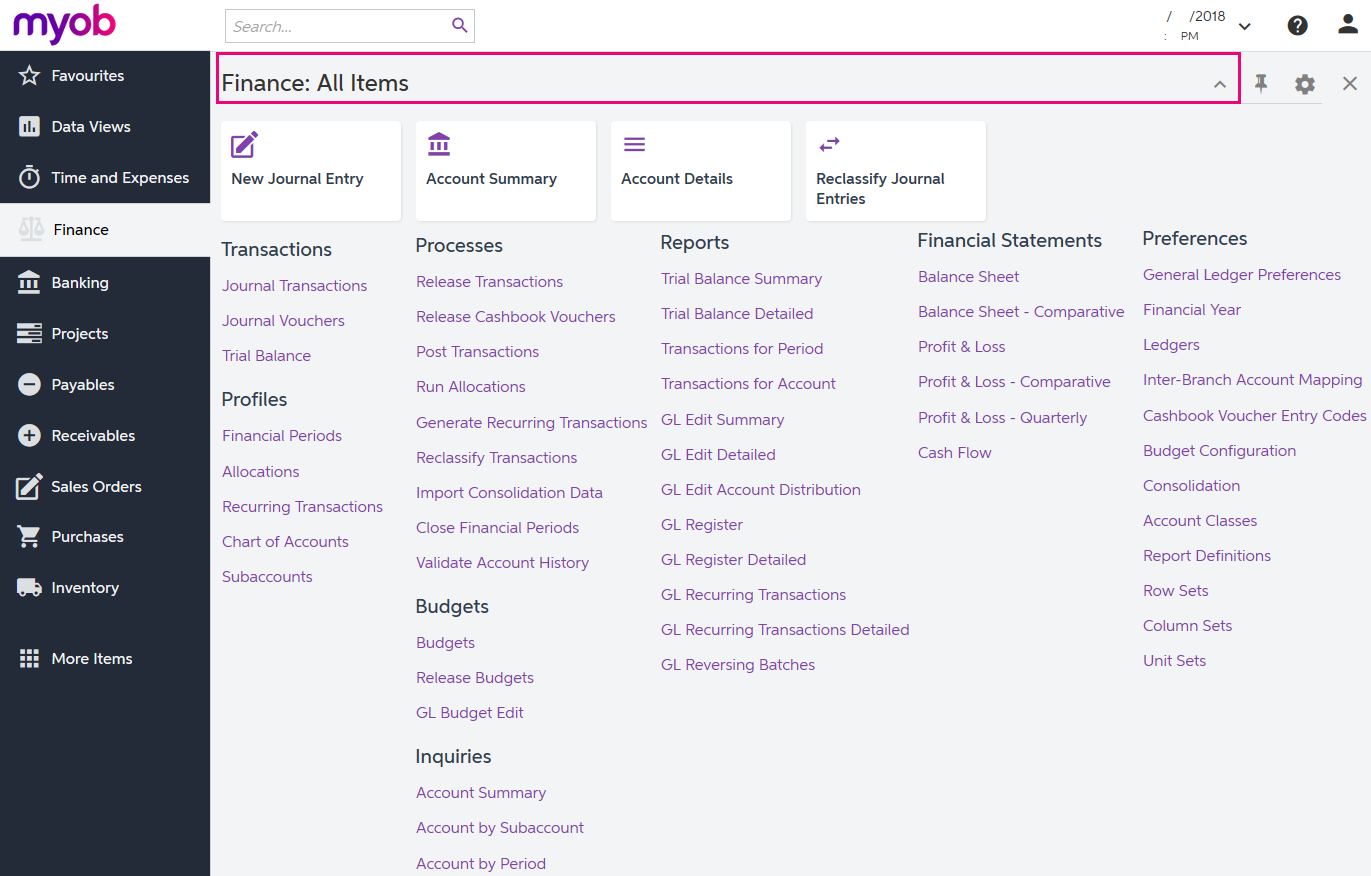


Figure: Displaying all items of the Finance workspace

##### 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.

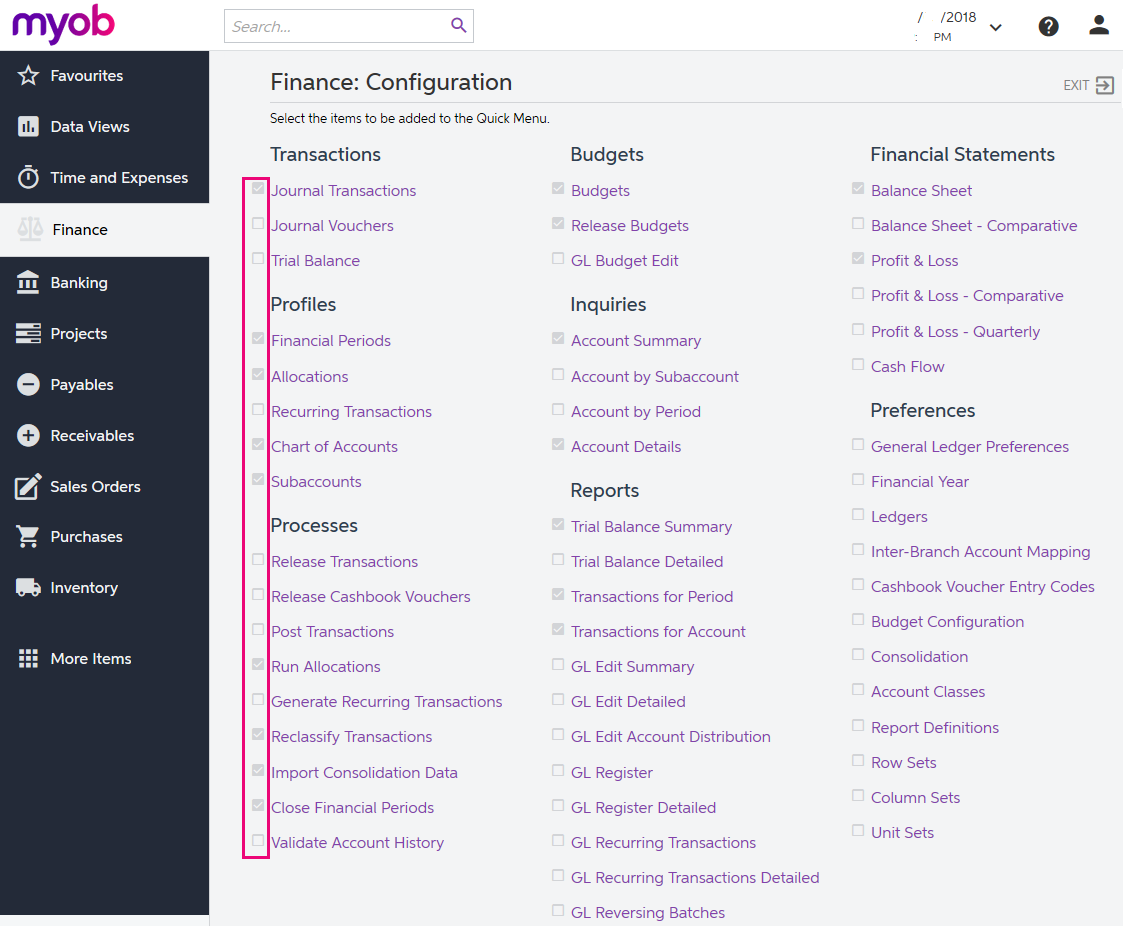


Figure: Adding forms to a Quick Menu

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.

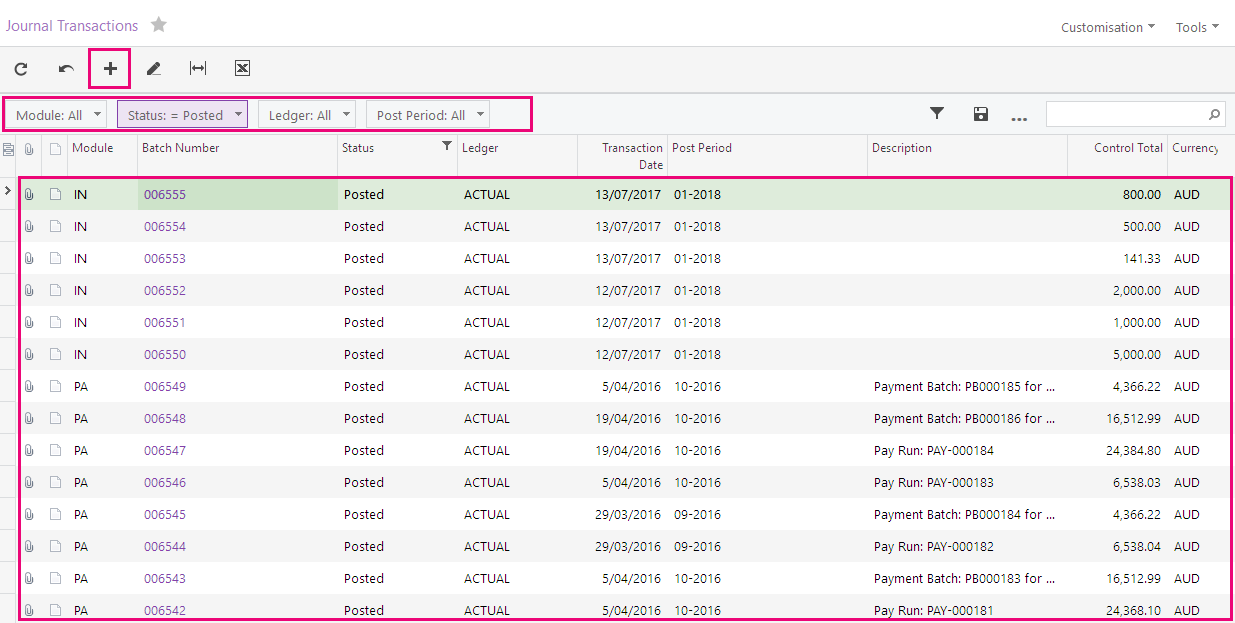


Figure: Viewing the Journal Transactions search form

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).

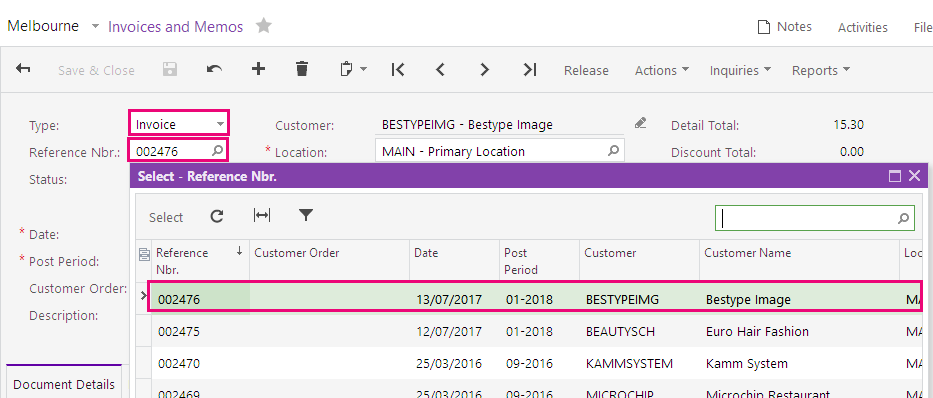


Figure: Opening a document by its reference number

## 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.

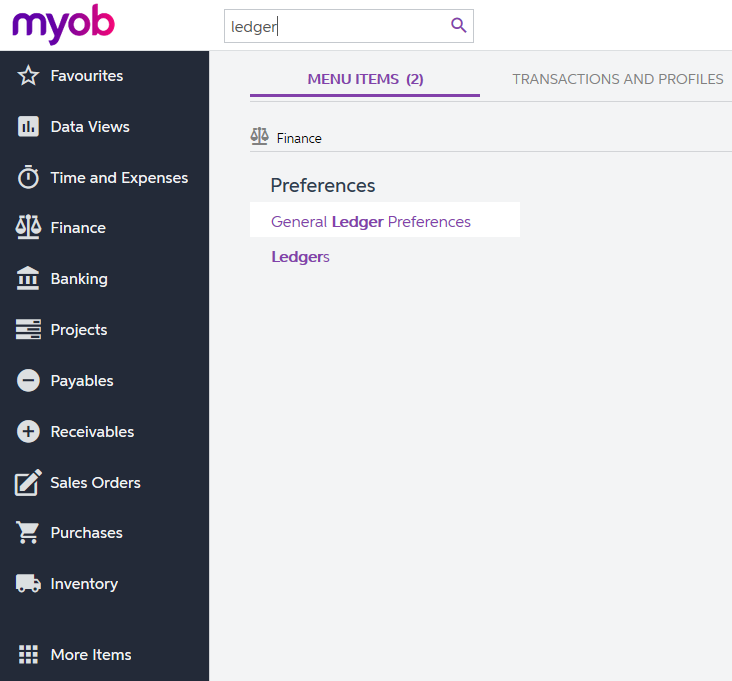


Figure: Searching for a form by title in the modern UI

* 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.

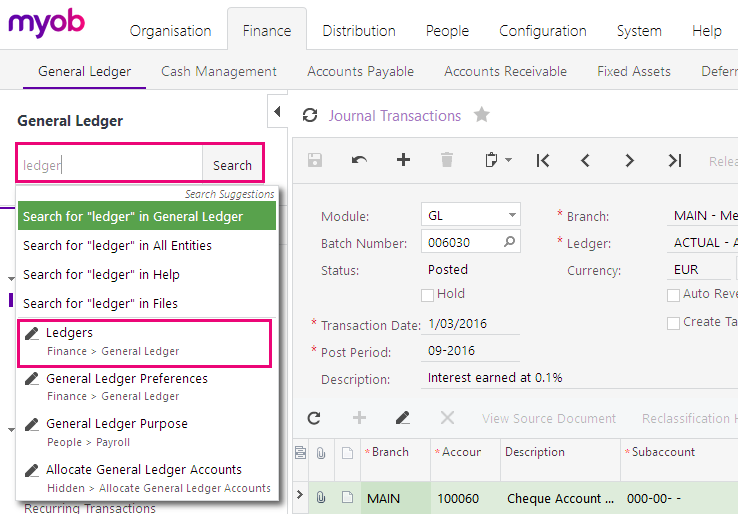


Figure: Searching for a form by its title in the classic UI

##### 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

1. 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.

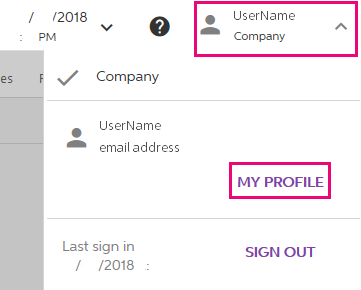


Figure: Opening the user profile

1. 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) |

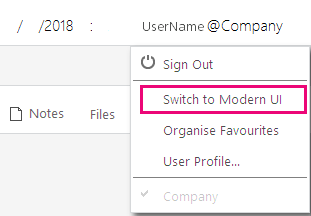


Figure: Switching to the modern UI

##### 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)

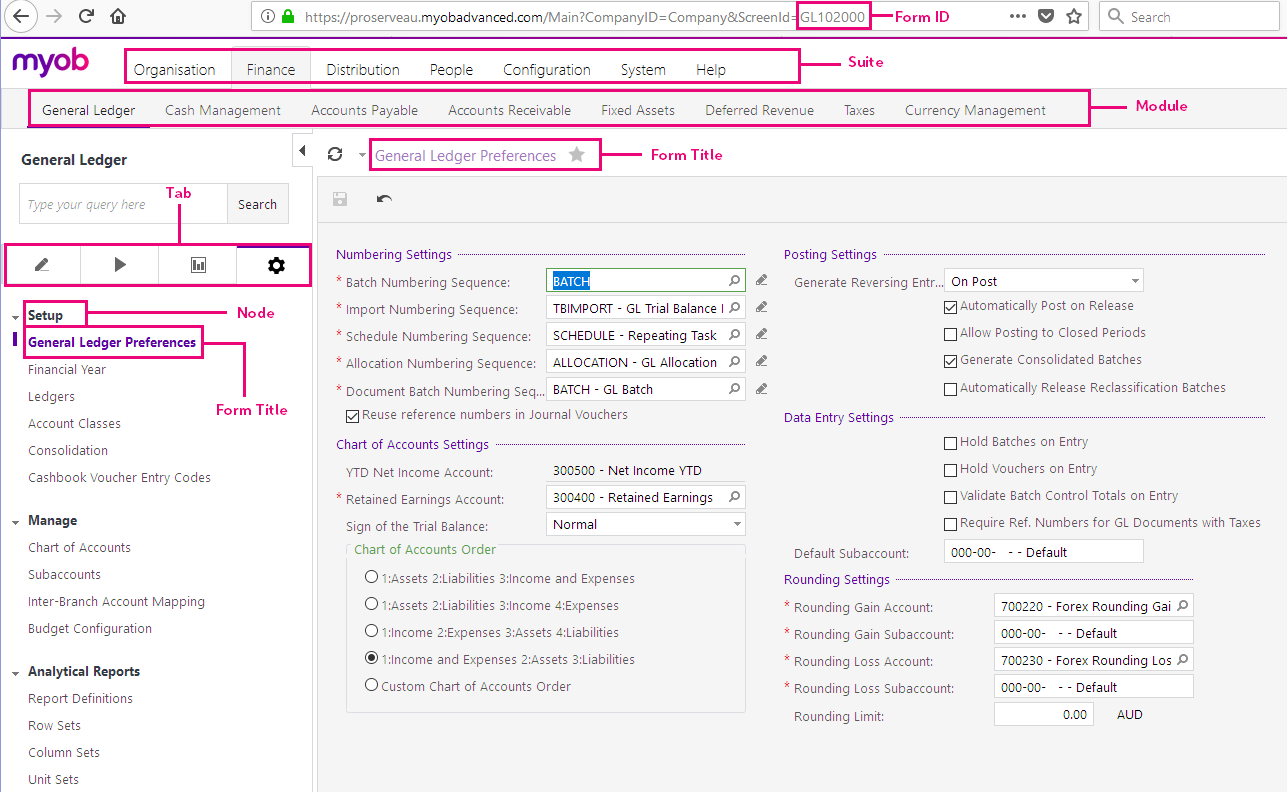


Figure: General Ledger Preferences form in the classic UI

# Product Features

Not all features are available in all MYOB Advanced Business Editions, for example as you can see from the following comparison chart, Custom Sales Order types are only available in Enterprise Edition.

Contact your Business Partner for more information on the different Editions or if you want to add more features to Advanced Business.

## MYOB Advanced Business – Edition Comparison Chart

### Sales Orders

|  |  |  |  |
| --- | --- | --- | --- |
| **Product Features** | **MYOB Advanced Business Edition** | | |
|  | Standard | Plus | Enterprise |
| Sales Order Entry |  |  |  |
| Shipments and Backorder Processing |  |  |  |
| Customer Returns |  |  |  |
| Discounts, Promotional and Special Pricing |  |  |  |
| Purchase Orders Directly from a Sales Order |  |  |  |
| Custom Sales Order Types |  |  |  |

# Selling to my Customers

We are in business to provide goods and/or services to our customers. By using the Sales Orders module, you can easily setup sales order processing to fit your sales workflows. MYOB Advanced provides order types, and in the Enterprise edition you can create custom types of orders with special processing. The Sales Orders module provides flexible pricing and discounting policies. With MYOB Advanced, your company can deliver orders accurately, consistently, and efficiently.

Let’s look at how we manage sales and sales orders in MYOB Advanced.

When we sell goods or services to our customers, a sales order is usually raised; we then pick the goods and ship them depending on the customer’s instructions. The customer may receive the invoice with the goods or we may send the invoice later. The customer then pays the invoice based on the terms we have agreed.

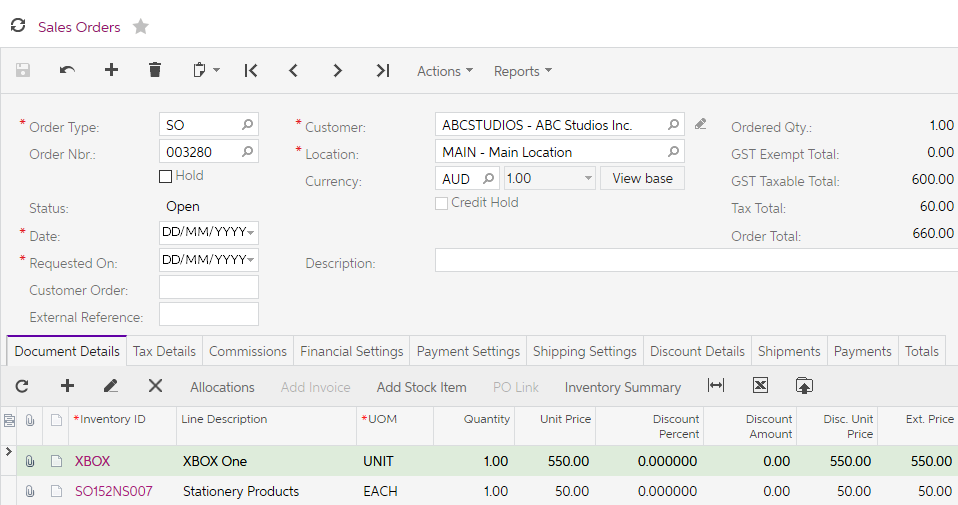


Figure: Sales Order showing Stock and Non-stock items

In your training today, we will go over the sales order module. Receiving payment for customer invoices will be covered in the Accounts Receivable module of the Finance suite.

As MYOB Advanced is highly configurable, the features and processes may differ for your business. Please refer to your Business Partner for details on any customisations they may have included in your implementation.

The Sales Orders module supports the following sales order types in the Enterprise edition of MYOB Advanced:

* CM (Credit Memo)
* CR (Cash Returns)
* CS (Cash Sale)
* IN (Invoice)
* QT (Quote)
* RC (Return for Credit)
* RR (Return with Replacement
* RM (Generic Authorised Return)
* SA (Sales Order with Allocation)
* SO (Sales Order)
* TR (Transfer)

In the Enterprise Edition, you can also create new Order Types.

Your MYOB Advanced will be implemented by a consultant who is Certified to Implement MYOB Advanced Business. As mentioned previously, MYOB Advanced is highly configurable, this training covers the basic business processes you need to know when selling to your customers.

## What do I need to know?

When businesses sell goods and/or services they usually raise a sales order, sometimes the sales order is created after a quote has been raised. We will cover the basic sales cycle in MYOB Advanced, should you want to know any additional information, please see the help pages of MYOB Advanced or ask your Business Partner.

# Sales Order Preferences

After review of your company’s needs, your implementing partner will go through and set up the preferences for the Sales Orders module. Preferences include numbering sequences for customer documents, validation requirements for sales orders and shipments, approval and mailing settings, and the default freight expense account and subaccount. These are set up in the **Sales Order Preferences** form (SO101000).

You should only make changes to any settings in **Preferences** after talking to your Business Partner.

### Activity 1 – Sales Order Preferences

1. Go to the **Sales Order Preferences** form (SO101000; Sales Orders > Preferences (Full Menu)).

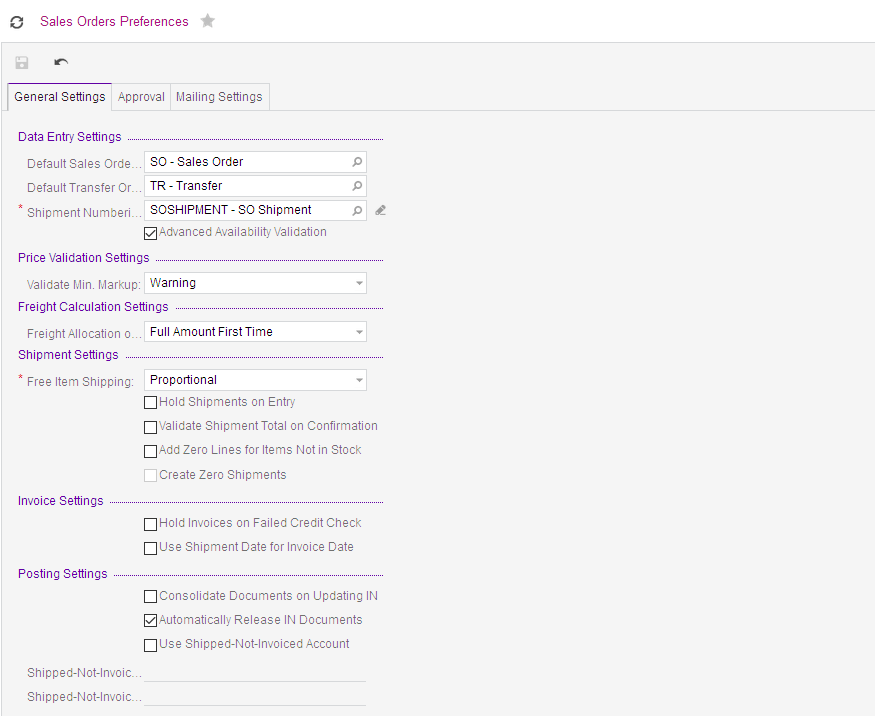


Figure: Sales Order Preferences

The **General Settings** tab holds the default settings of the Sales Order module.

The **Validate Shipment Total on Confirmation** in the **Shipment Settings** checkbox allows you to choose whether a Control Quantity: field is displayed on the shipment. The Shipped Quantity and Control Quantity fields must be the same before you can save the document.

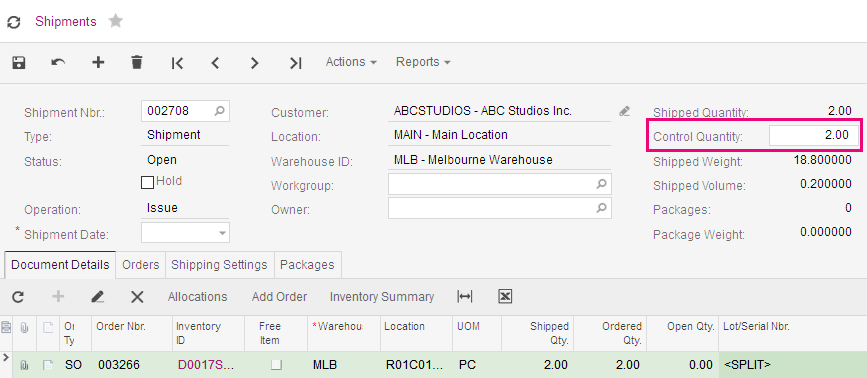


Figure: Sales Order with Control Quantity

#### Approval

*Outside the scope of this course.*

The **Approval** tab is shown when the **Approval Workflow** feature is enabled. If you would like this feature for your business contact your Business Partner.

The **Mailing Settings** tab is where you can list the predefined mailings used for sending documents by email.

### Other Preferences

### FOB Points

*Outside the scope of this course.*

At FOB Points, the supplier delivers the goods and pays for the freight to that point. The freight and other expenses for the goods from that point are paid by the customer.

### Shipping Terms

*Outside the scope of this course.*

Shipping terms are used to define the shipping, packaging, and handling costs, depending on the shipment amount.

### Shipping Zones

*Outside the scope of this course.*

Shipping zones used to calculate freight charges when your company ships goods to customers.

### Ship Via Codes

*Outside the scope of this course.*

A ship via code denotes a possible method your company uses to ship goods to customers.

### Boxes

*Outside the scope of this course.*

You use this form to create and maintain the list of boxes used by your company for shipping goods. Settings such as box dimensions, weight, and maximum weight capacity are used for freight calculation for shipments.

# Receivables Preferences

We are now going to move away from the **Sales Order** module to the **Receivables** module.

As part of your implementation, your Business Partner will configure MYOB Advanced to your needs and import master records, such as **Customers**. Once you are working with MYOB Advanced, you will need to be able to add to these records when you need to add a new Customer.

The **Receivables** module is defined on this form **Accounts Receivable Preferences** (AR101000). You can specify the default customer class associated with the **Receivables** module, to provide some settings when a new customer is added.

We will go over the **Receivables** module during our **Finance** training, for now we will look at this module’s role with the **Sales Orders** module.

### Activity 2 – Accounts Receivable Preferences

1. Go to the **Accounts Receivable Preferences** form (AR101000; Receivables > Preferences (Full Menu)) and review the settings.

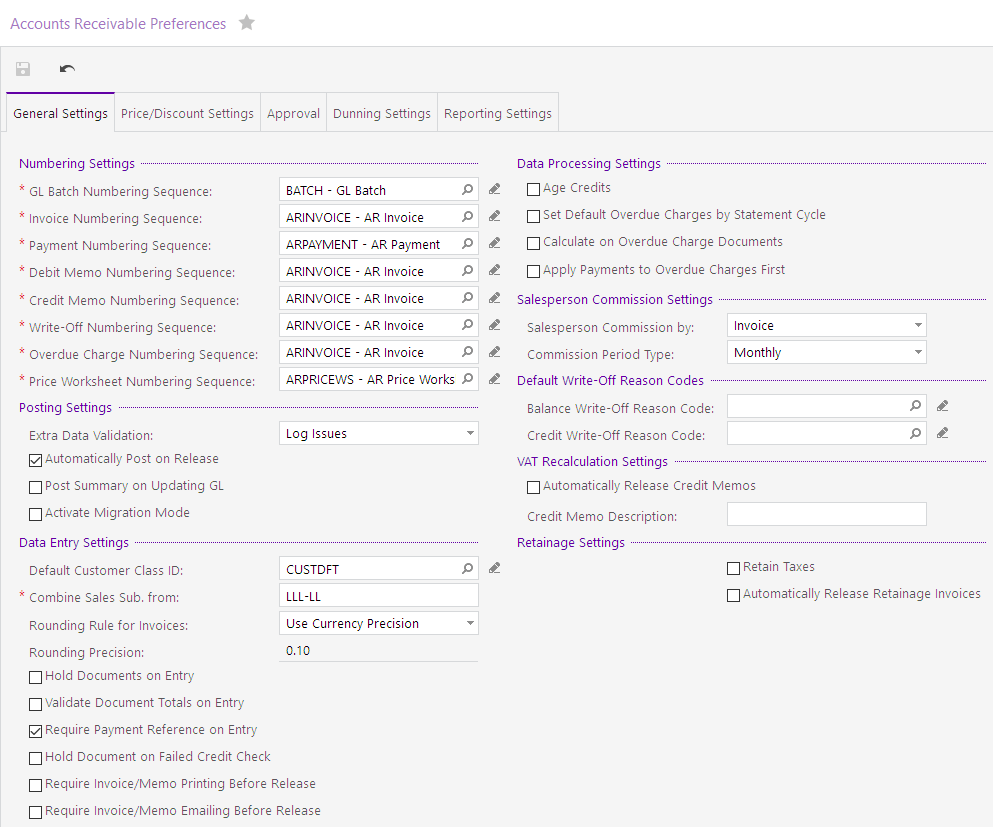


Figure: Accounts Receivable Preferences – General Settings tab

To raise a quote or a sales order, a customer must already be in the **Receivables** module.

### Activity 3 – New Customer

1. On the **Receivables** Menu, add a new customer by clicking on the tile **New Customer**. This will open the **Customers** form (AR303000; Receivables > Profiles) and add a new customer with the following details.

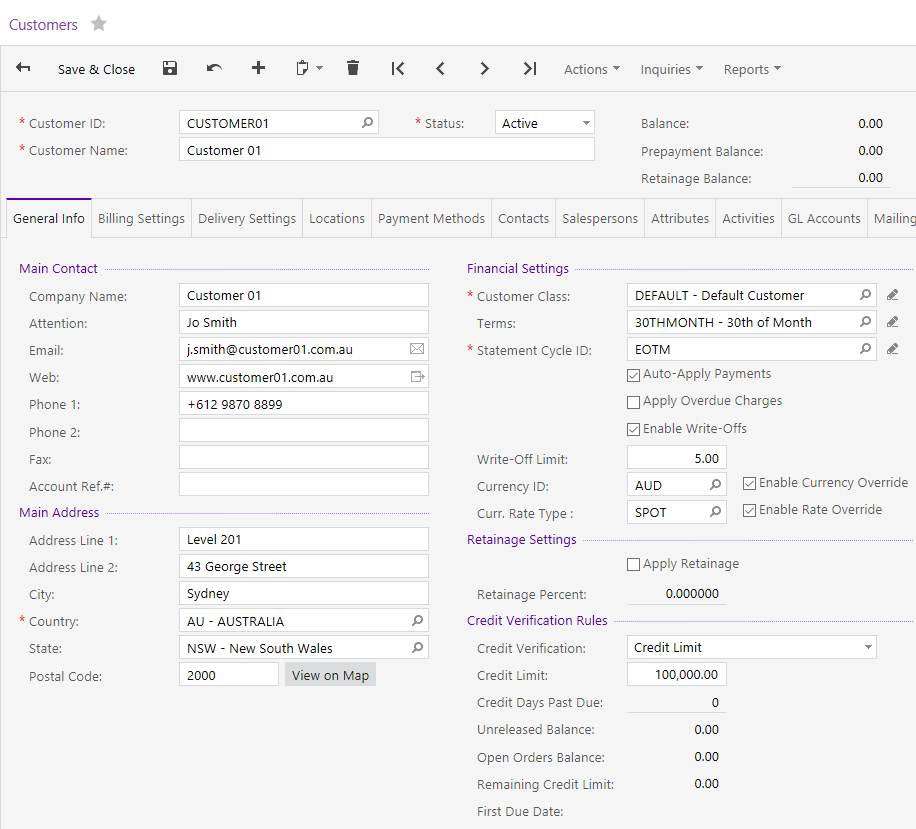


Figure: Customer General Info tab

1. On the **Delivery Settings** tab enter the following information and then save .

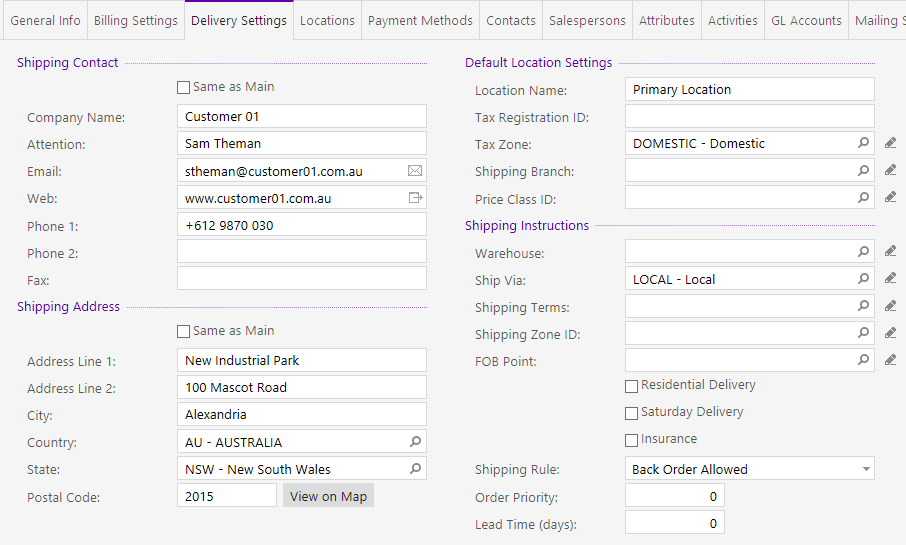


Figure: Customer Delivery Settings tab

1. From the Contacts tab, add 2 new contacts with the following information then save .

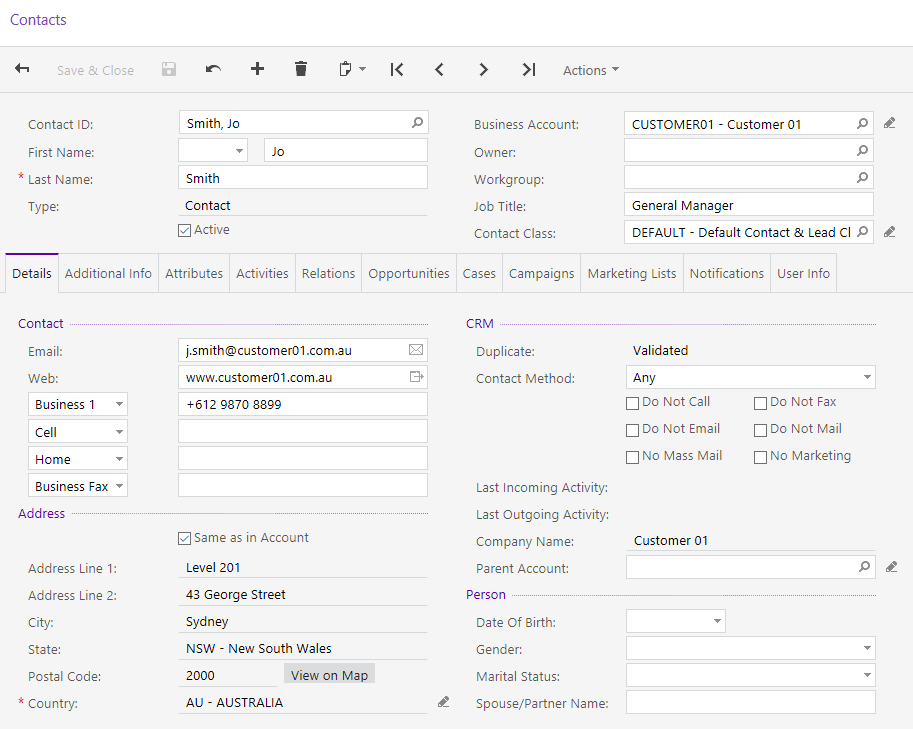


Figure: Contact 1

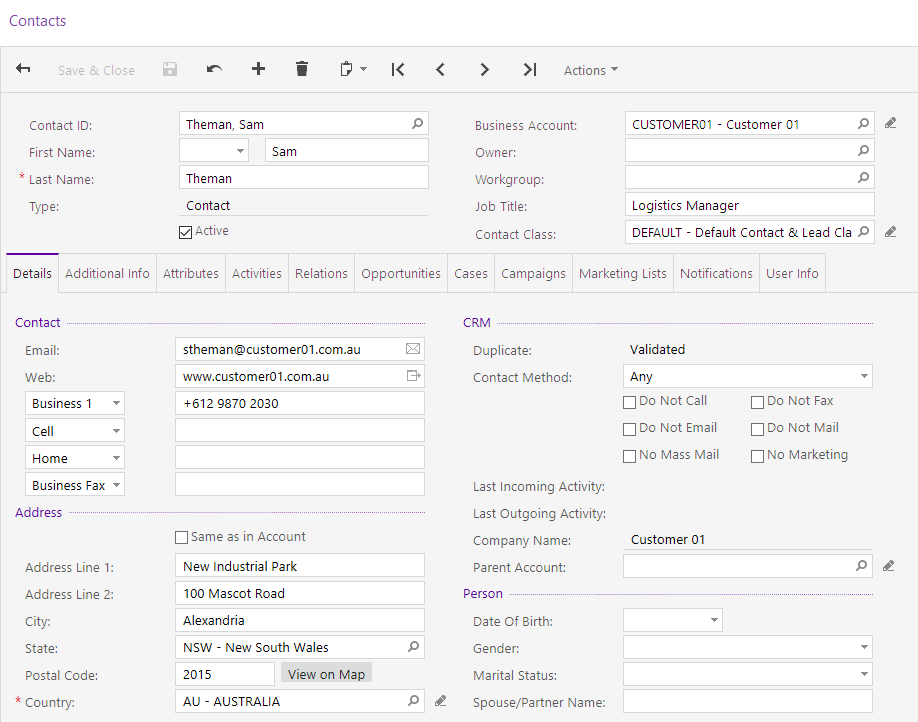


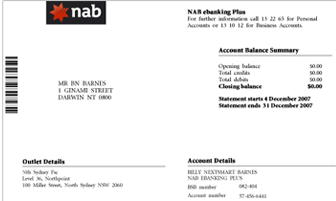
Figure: Contact 2

We let the **Customer Class,** **DEFAULT** update the record, except for the credit limit of $100,000.00.

Some of the defaults that came from the customer class include:

* Terms
* Statement Cycle
* Payment Method
* Country
* Tax Zone
* Default General Ledger Accounts
* Default Mailing Settings

# Selling Cycle











Shipment

Figure: Selling Cycle

The Sales Orders module helps you organise and control the selling process, manage quotes for customers who purchase your goods and services.

In our training we will be going through the selling cycle, covering all the above steps except for the Receivables Payment which is covered in the Finance topic.

As mentioned previously, MYOB Advanced is highly configurable, and not all functions are available in all MYOB Advanced Business editions; for example, Custom Order Types are only available in the Enterprise Edition.

In MYOB Advanced there are a few steps from Quote to final Invoice. Although you will be working through all these steps, just take a moment to review who would be entering or processing the documents in your company. Each step may be done by different people or a combination of people in your company.



## Quotes and Sales Order Process

We enter Quotes on the Sales Order form. The transaction behaviour on this form is controlled by the Order Type. In our training, we are going to enter the following Order Types.

* QT – Quote
* SO – Sales Order
* CM – Credit Memo
* RC – Return for Credit
* IN – Invoice Order

There are other Order Types available. For more information on these types please refer to the Help or ask your certified consultant.

### Order Type QT (Quotes)

### Activity 4

Our new customer would like a quote for a Wireless Solar Keyboard. They need the quote because of their purchasing rules.

1. On the **Sales Orders** Menu, add a new quote by clicking on the tile **New Quote**. This will open the **Sales Order** form (SO301000; Sales Orders > Transactions) and add a new quote with the following details and save .

A **Quote** uses the **Sales Order** form with the **Order Type: QT**:

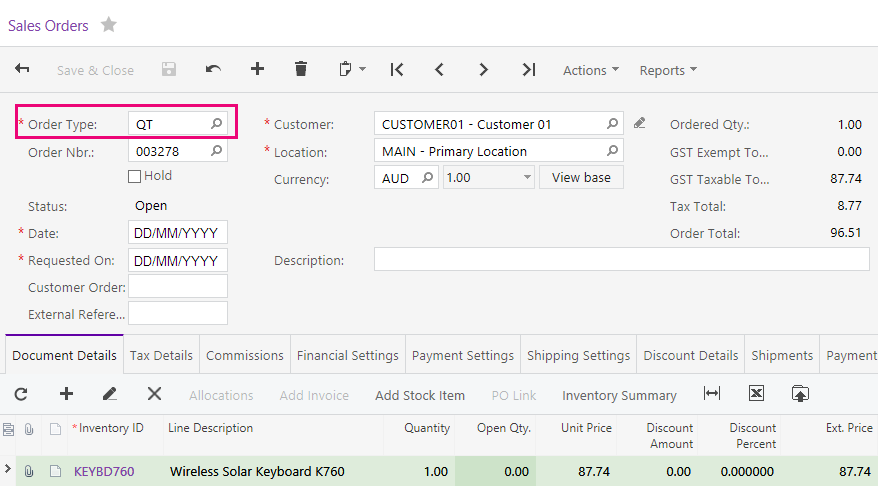


Figure: Quote Type QT Sales Order

1. The quote has been accepted, copy the order from the **Actions** dropdown list on the form toolbar**,**

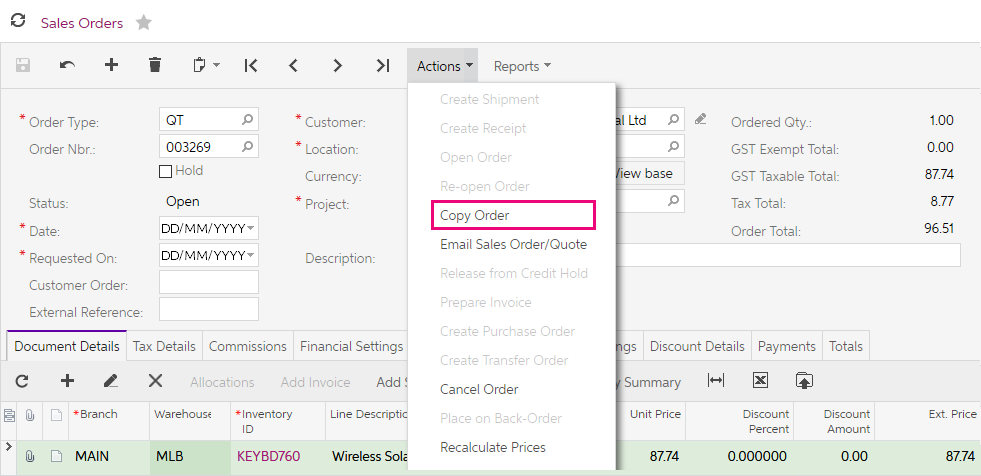


Figure: Copy Order feature under Actions dropdown

1. Choose the **Order Type: SO** and save 

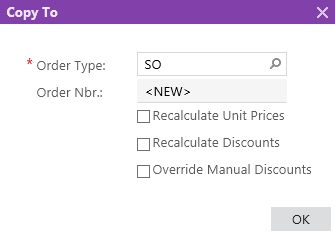


Figure: Copy To dialogue box

The sales order will appear on the screen. We can then email the sales order to the customer, also from the Actions dropdown list.

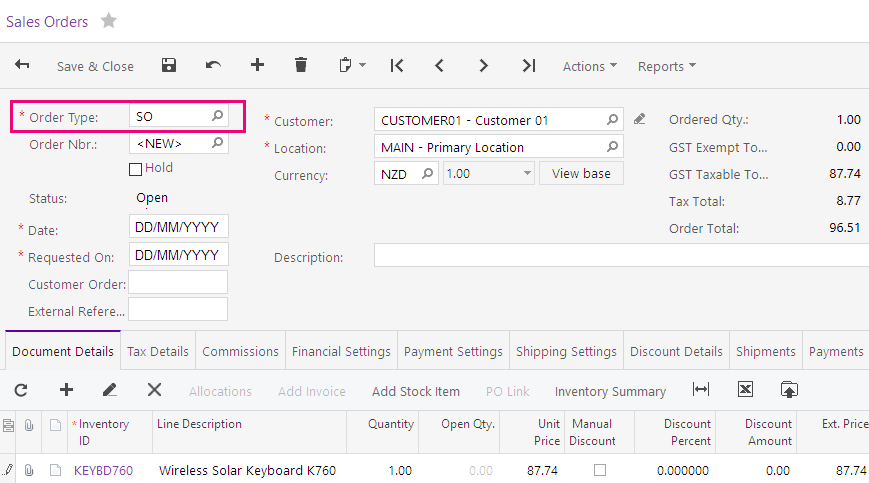


Figure: Sales Order created from quote.

### Sales Order Processing

The good will be shipped to the client after the sales order is converted to a Shipment. Follow the steps below to ship the goods to the client and email and release the invoice.

1. From the **Actions** dropdown list on the form toolbar select **Create Shipment**

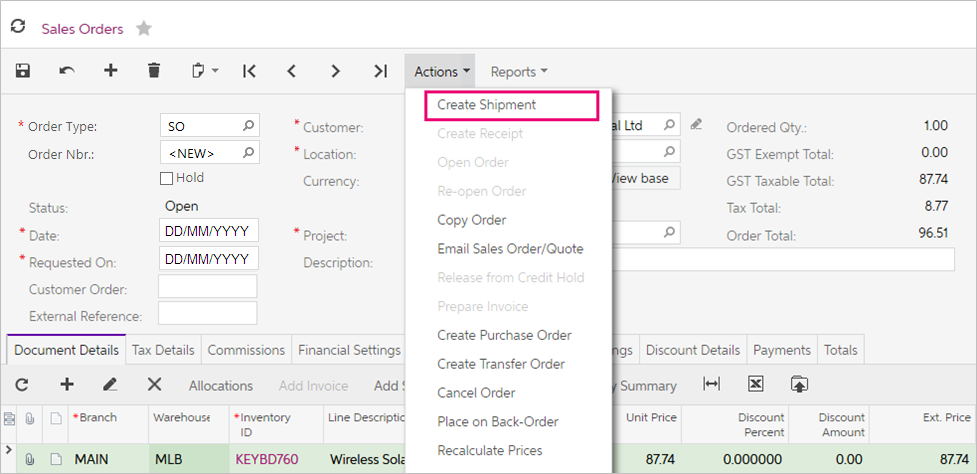
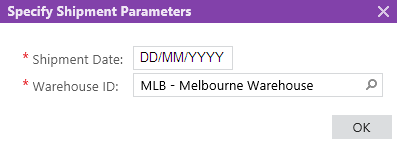


Figure: Create Shipment feature under Actions dropdown

1. A dialogue box will appear for you to **Specify Shipment Parameters**. Accept the defaults displayed and **OK**.



You will be taken to the **Shipments** form (SO302000).

1. From the **Actions** dropdown list on the form toolbar select **Confirm Shipment,** you can then print the pick list so the goods can be ready for delivery.

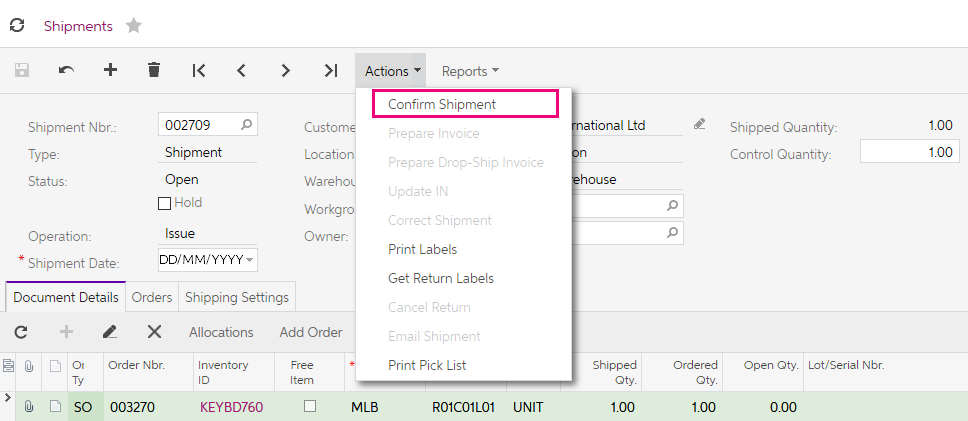


Figure: Confirm Shipment feature under the Actions dropdown

1. From the **Actions** dropdown list on the form toolbar select **Prepare Invoice.**

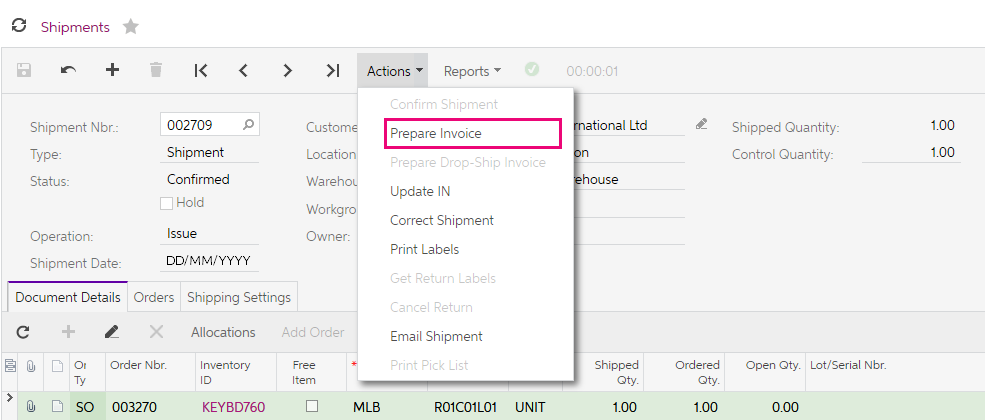


Figure: Prepare Invoice feature under the Actions dropdown

You will be taken to the Invoice form (SO303000)

1. On the **Invoice** formfrom the **Actions** dropdown list on the form toolbar select **Release** this will post the transactions to the general ledger, you can now email the invoice to the customer**.**

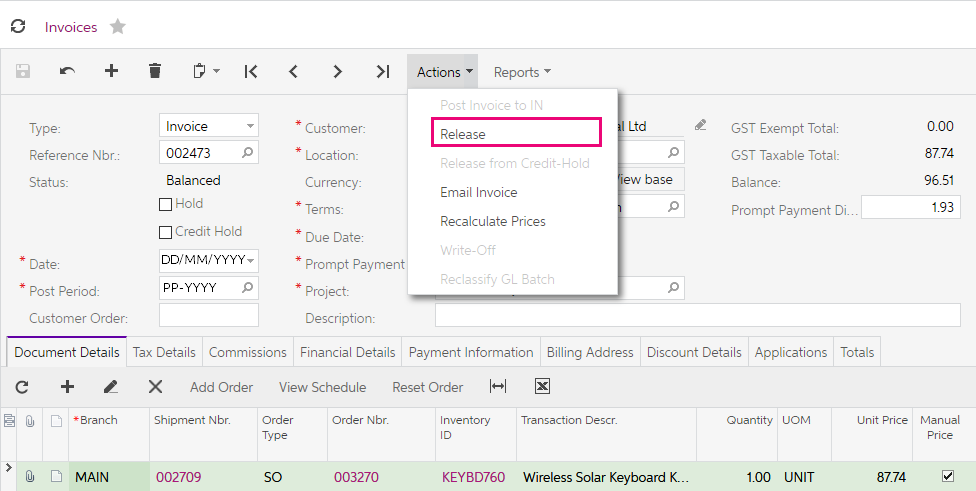


Figure: Release feature on the Actions dropdown on Invoice form

### Back Orders

Our customers Euro Hair Fashion and Elevation Computers both want the 4.2GHz as5 Processor, Euro Hair Fashion has ordered 10 and Elevation Computers 20 units. We want to order enough stock to fill the orders.

### Activity 5

1. On the **Sales Orders** Menu, add a new sales order by clicking on the tile **New Sales Order**. This will open the **Sales Order** form (SO301000; Sales Orders > Transactions) and add a new sales order with the following details and save .

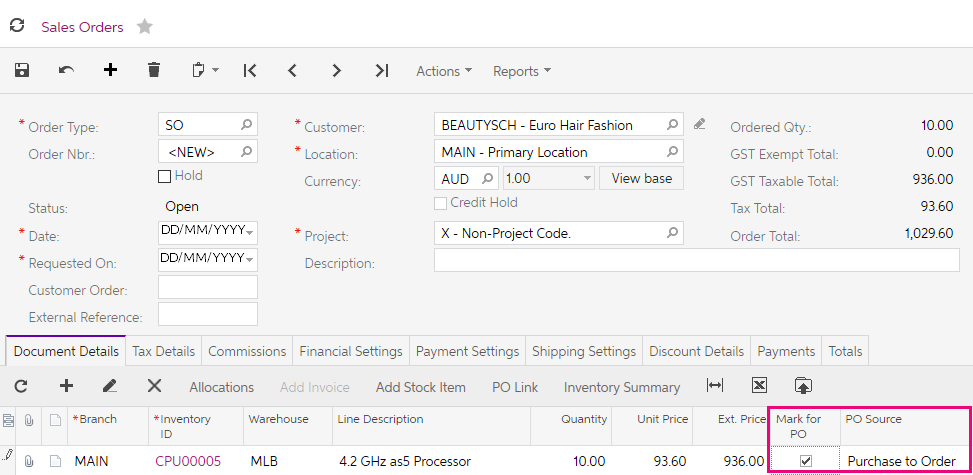


Figure: Sales order marked for Purchase to Order

1. Create another **Sales** **Order** with the following details and **Save** your changes with the **Status** of **Open**:

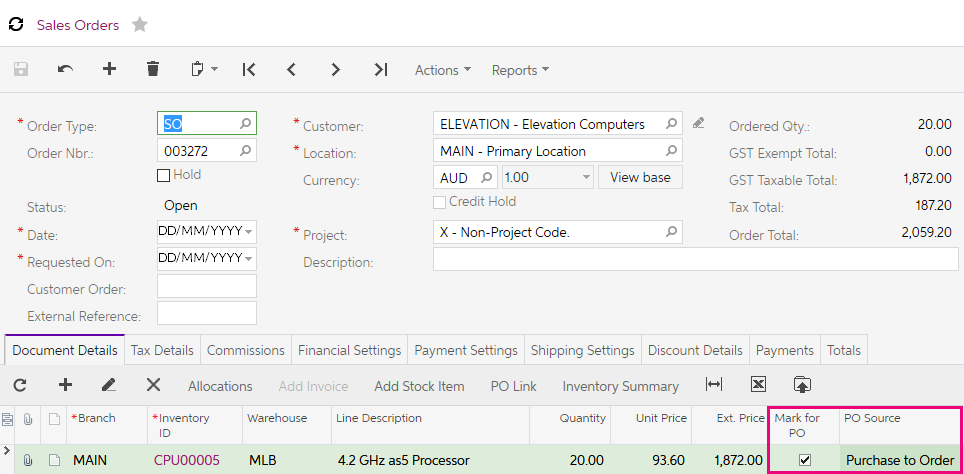


Figure: Sales order marked for Purchase to Order

Now we have saved the two sales orders, and marked them for PO, we can generate a purchase order.

1. Open the **Create Purchase Orders** form (PO505000; Purchases *>* Process) and select the two **SO to Purchase** created earlier in the form grid.
2. Then enter the Supplier for the orders, **Shenzhen Jackren Technology Co. Ltd** if they are not already showing**,** then **Process** the **SO to Purchase** orders.

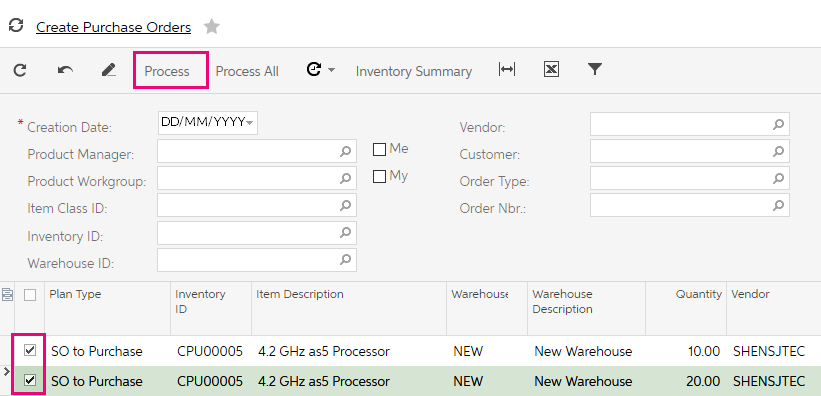


Figure: Two purchase orders selected for processing with supplier added.

1. A Purchase Order combining the two **SO to Purchase** is created.

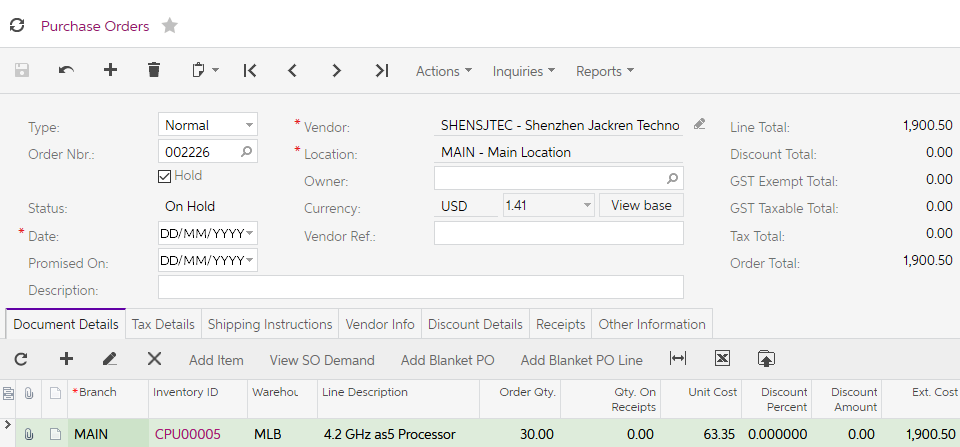


Figure: Purchase Order created

1. Take the order off **Hold**.
2. From the form toolbar select **Email Purchase Order** from the **Actions** dropdown list.

You will be able to see the sales orders that belong to this purchase orders by selecting **View SO Demand** on the grid toolbar.

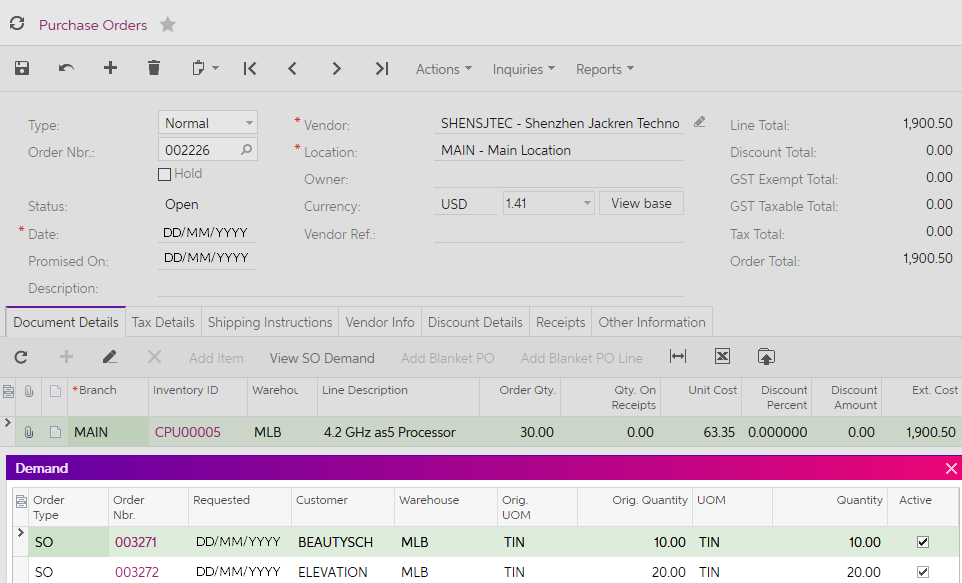


Figure: View SO Demand dialogue box

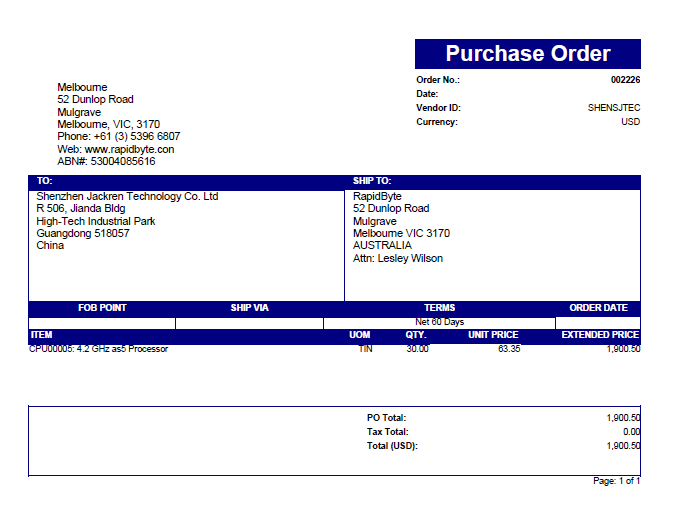


Figure: Purchase Order attached to email sent to supplier

1. In a few days, the CPU00005 – 4.2 GHz as5 Processors are received. Find the purchase order to Shenzhen Jackren Technology Co. Ltd and from the **Actions** dropdown list select; **Enter PO Receipt,** enter the **Supplier Ref.:** 99898. To put the goods in stock so you can ship them to your customer, **Release** the generated receipt**.**

Now it’s time to ship the orders to our customers.

1. Go to the *Process Orders* form (SO501000); Distribution > Sales Orders > Processes > Daily and select the two purchase orders from the previous activities. Process these Sales Orders with the **Action: Create Shipment.**

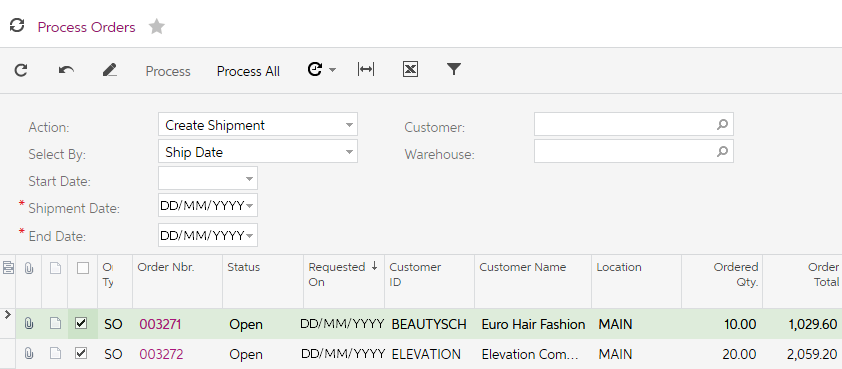


Figure: Process Orders with sales order ready to be shipped.

1. We now need to confirm the shipment and then invoice the customers. Go to the *Process Shipments* form (SO503000); Distribution > Sales Orders > Processes > Daily and select the two sales orders. Process the Shipments with the **Action: Confirm Shipment.**

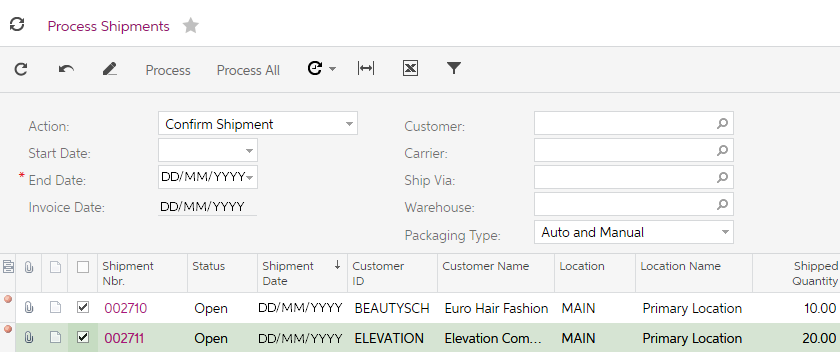


Figure: Process Shipments form

You should get an error when trying to process the shipments. When the Sales Order preferences were setup, it was decided that all shipments need to be validated before they can be confirmed. The feature **Validate Shipment Total on Confirmation** is ticked on the Sales Order Preferences.

This means you must go into each of the Shipments and update the **Control Quantity** to the **Shipped Quantity** on each of the shipments.

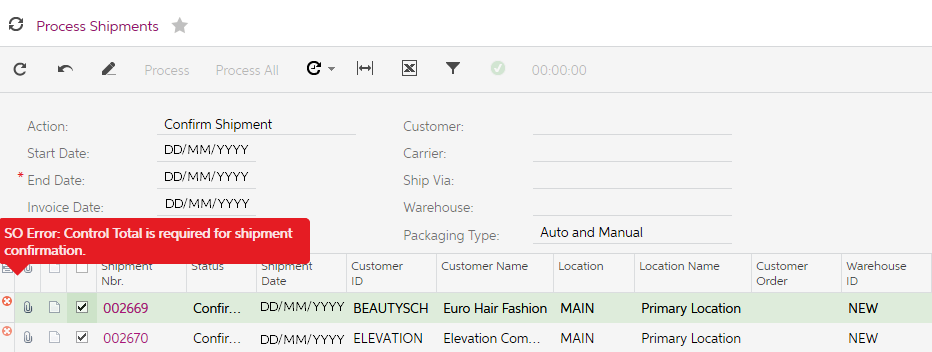


Figure: Error on process of Confirm Shipment

1. Find the shipment for the CPU00005 for Elevation Computers. Enter 20 in the **Control Quantity** as shown below.

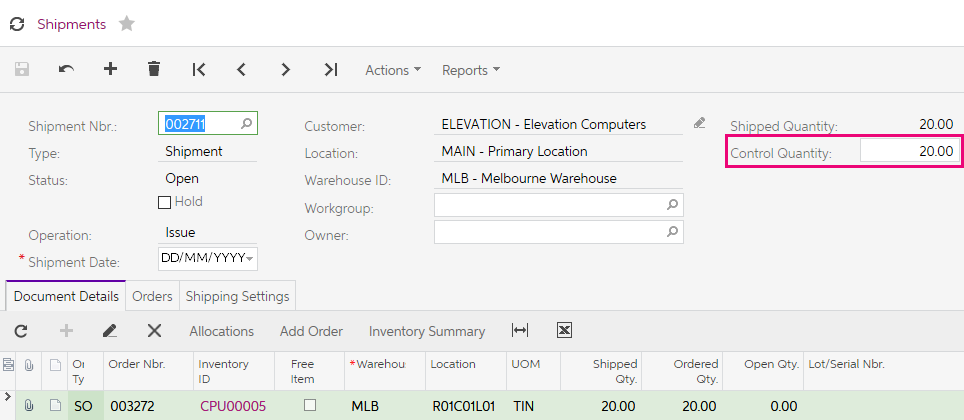


Figure: Control Quantity updated to allow the shipment to be confirmed.

1. Now you can select **Confirm Shipment** from the **Actions** dropdown list on the form toolbar.
2. Find the shipment for Euro Hair Fashion for the CPU00005 and repeat the two steps above but enter 10 as the **Control Quantity.**

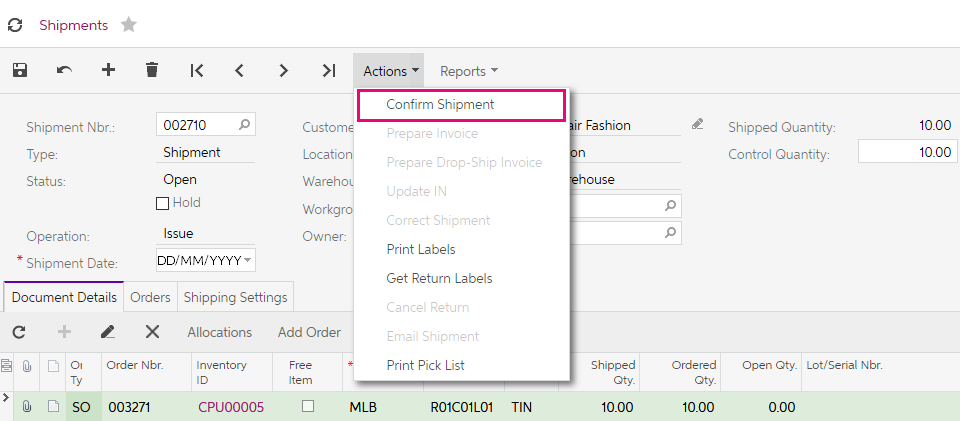


Figure: Confirm Shipment action item.

Our final task to complete the sale to our customers is to now prepare the invoices.

1. From the **Actions** dropdown list on the form toolbar of both shipments, select **Prepare Invoice.**

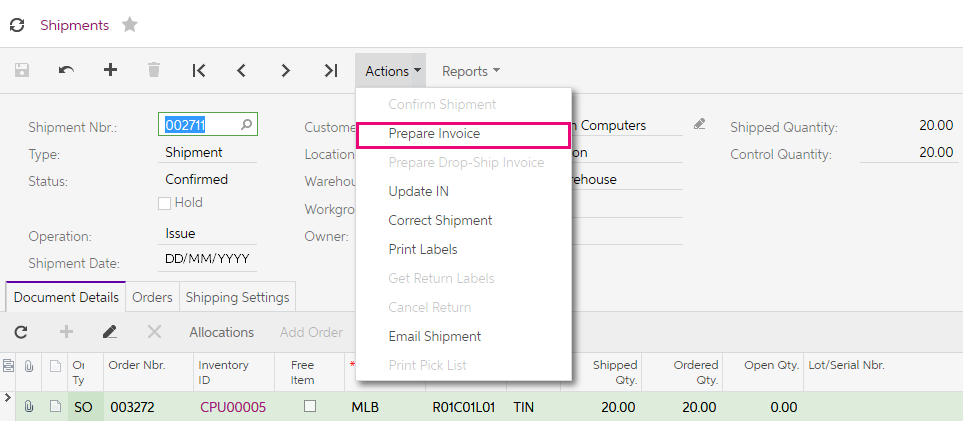


Figure: Prepare Invoice action item.

1. You will be taken to the **Invoices** form where you can **Release** bothInvoices from the **Actions** dropdown list on the form toolbar**.**

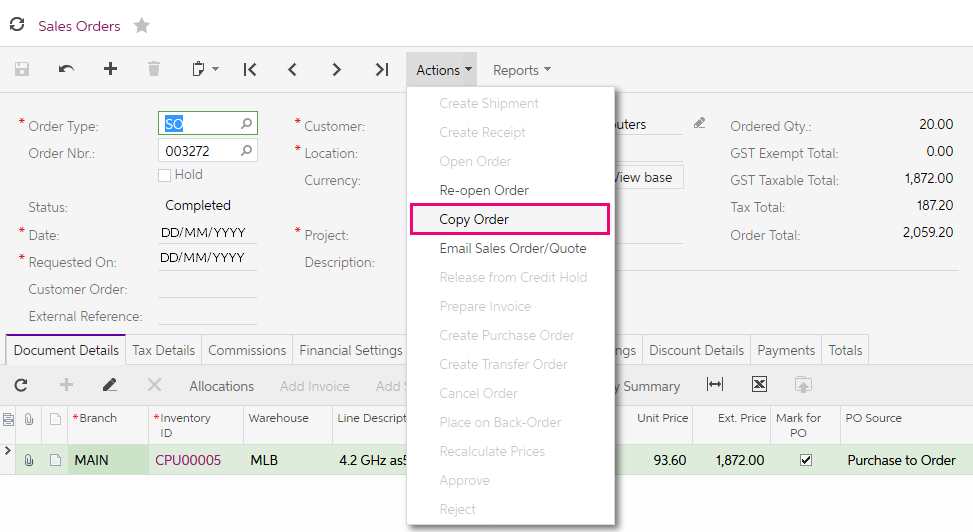
We are now going to enter two sales orders; a Credit Memo and a Return for Credit. These are created when customers reject or return goods to us.

### Credit Memo Order Type

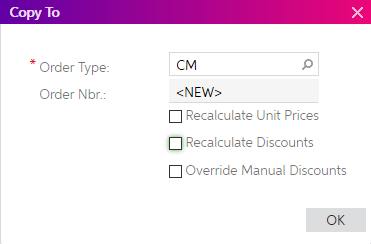
Elevation Computers wants to return 1 UNIT of inventory CPU00005 from the order just created.

### Activity 6

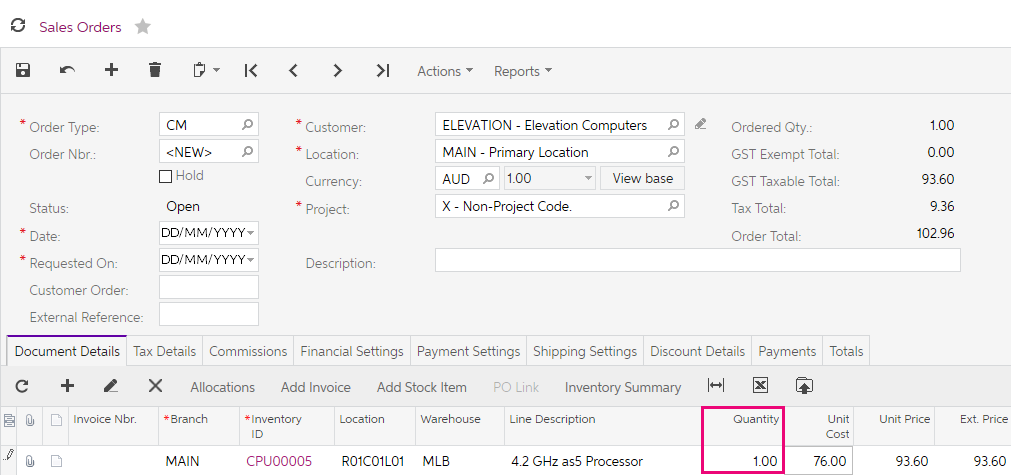
1. Open the **Sales Order** searchform (SO3010PL; Sales Orders > Transactions).
2. Go to the **Sales Order** raised in the previous activity for Elevation Computers and on the form toolbar select **Copy Order** from the **Actions** dropdown list**.**



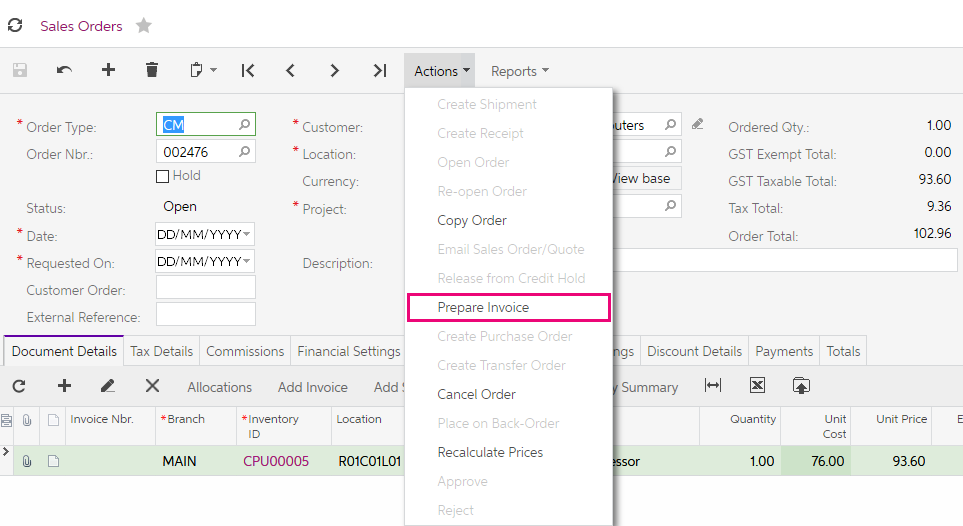
1. In the pop up, select the **Order Type: CM.**



1. On selecting **OK,** a **Credit Memo Order Type** will be created based on the previous order.
2. Change the **Quantity** to **1**, take the **CM** order off **Hold** and **Save**.



1. From the **Action:** dropdown list, select **Prepare Invoice** and then **Release** the **Credit Memo.**



### Return for Credit

In this activity, you will search out an existing order and receive the goods back from and issue a credit.

### Activity 7

1. Open the **Sales Order** searchform (SO3010PL; Sales Orders > Transactions), then search for the **Sales Order** for Euro Hair Fashion for 10 4.2GHz as5 Processors and bring this sales order to the screen. On the form toolbar select **Copy Order** from the **Actions** dropdown list.
2. In the pop up, select the **Order Type: RC**

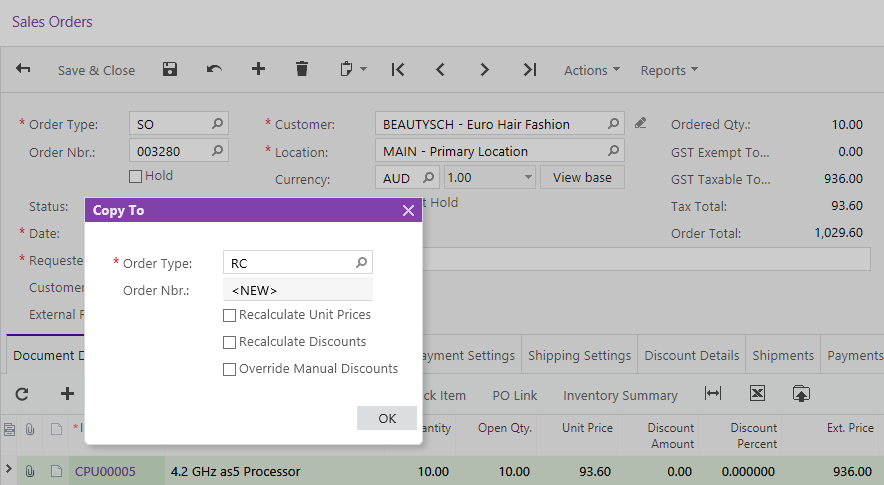
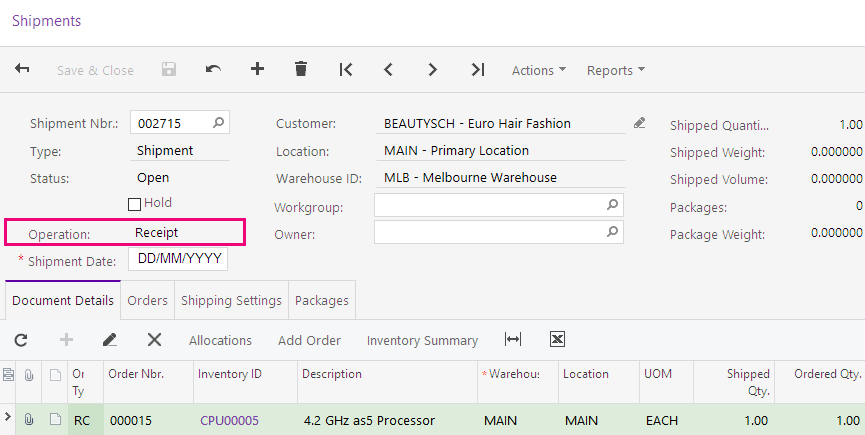


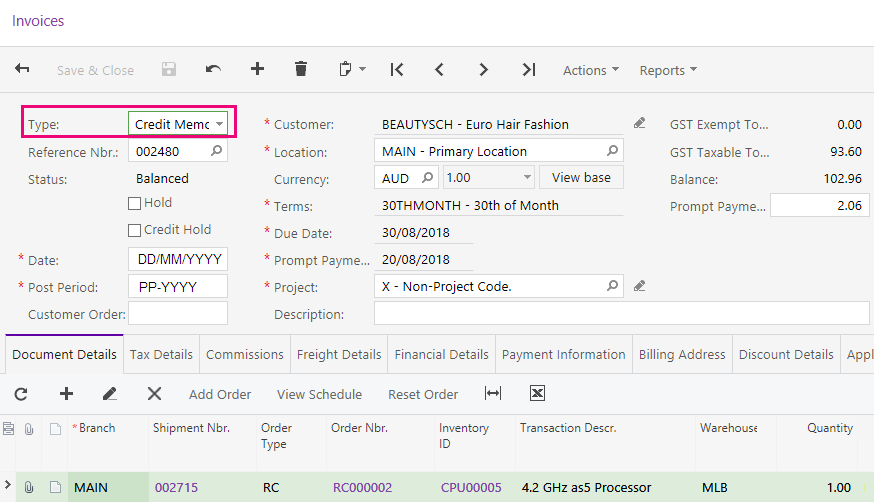
Figure: Sales Order Copy

On selecting **OK,** a **Return for Credit Order Type** will be created based on the previous order

1. Change the Quantity to 1 and from the **Actions** dropdown list, select **Create Receipt.**



1. From the **Actions** dropdown list, select **Prepare Invoice.** This will create the **Credit Memo.**



1. Again, from the **Actions** dropdown list, select **Release**. This will complete the transaction.

### Invoice Order

Sometimes you might want to directly invoice your customer without raising a sales order or creating a shipment. An IN type of sales order is the preferred way of doing this.

### Activity 8

1. On the **Sales Orders** Menu, add a new sales order by clicking on the tile **New Sales Order**. This will open the **Sales Order** form (SO301000; Sales Orders > Transactions).
2. In the Order Type field select the IN Invoice and update with the following details;

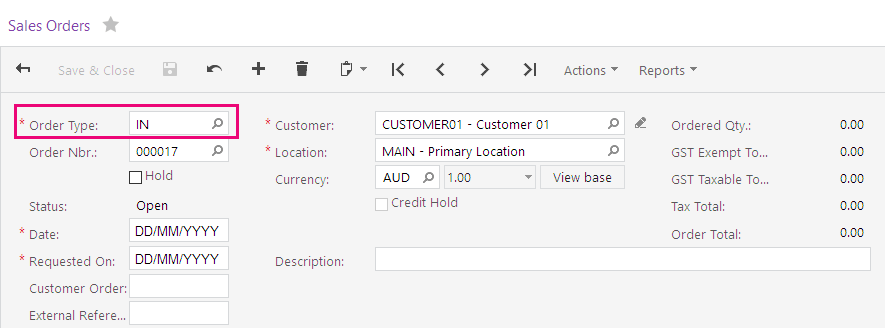


Figure: New IN type sales order

1. You want to check the stock levels in the different warehouses for the stock items starting with CPU. Click on the  from the grid toolbar.
2. In the Inventory Lookup dialogue box that appears enter CPU in the Inventory field, you will see the quantities available for the items across the different warehouses. Select 10 of the CPU00005 and 5 of the CPU00006V both from the MLB warehouse.

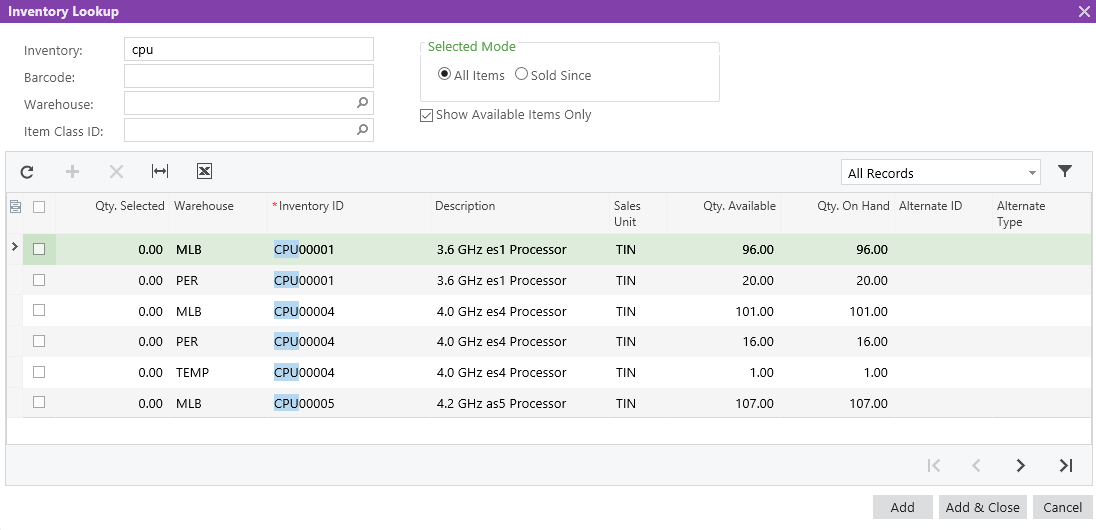


Figure: Inventory Lookup

1. From the **Actions** dropdown on the form toolbar, **Prepare Invoice**
2. Go to **Shipments** and click on the **Invoice Nbr.** Hyperlink. The Invoice you just prepared will show on the screen. From the **Actions** dropdown, **Release** the invoice.

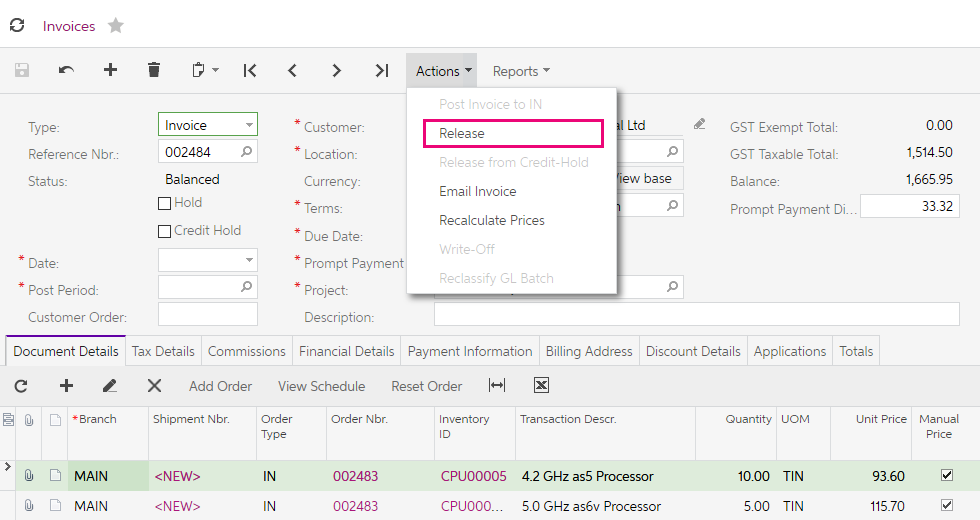


Figure: Invoice from IN order.

As mentioned, by using the IN order type, we do not need to process the sales order or create and confirm the shipment.

1. To see the general ledger journal that was created when we released the invoice, go to the **Financial Details** tab and click on the **Batch Nbr**. hyperlink.

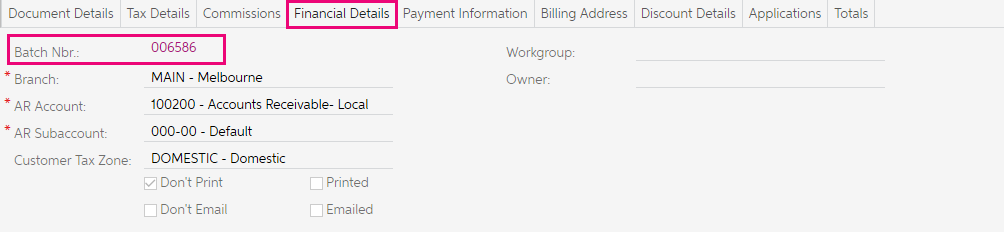


Figure: Financial Details tab of released invoice

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Figure: Journal transaction from released invoice.

## Sales Prices

MYOB Advanced provides the following ways to maintain sales prices:

* **Default prices**: You define and maintain a price for each individual item. The default price is used for sales. You can use discounts with these prices. There is no history of price changes when using Default pricing only.
* **Price lists**: You can setup different pricing strategies by defining a base price list, price lists that apply to a group of customers and a customer, promotional price lists, and prices that depend on the quantity of the product.

To show how both ways work, you will now add a new stock item and sell this to a customer using both default prices and a price list.

### Activity 9

1. Open the XRL-120 Laptop in the **Stock Items** form (IN202500); and review the **Price/Cost Info** tab note the **Default Price.**

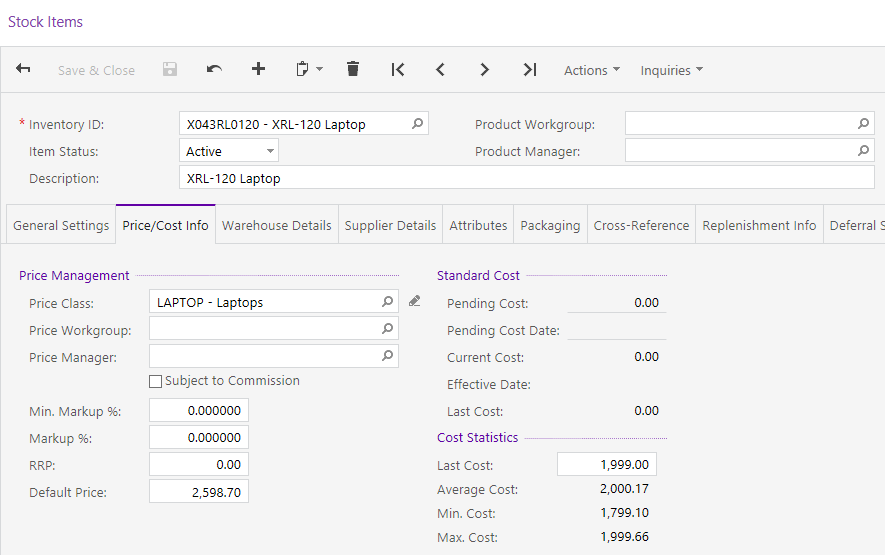


Figure: Stock Item

1. Open the **Sales Prices** form (AR202000; Sales Orders > Profiles) and review the **Price Type** of **BASE** for the Laptops.



Figure: Sales Prices filtered for Price Type of Base

1. Open the *Customers*form (AR303000) and locate your customer **ABCSTUDIOS**. On the **Delivery** **Settings** tab under **Default** **Location** **Settings**, is there a **Price** **Class** linked?

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Figure: Customers – Delivery Settings tab

1. Create a sales order – **Order Type: SO,** for **Customer ID:** **ABCSTUDIOS** for 1 x Inventory Item **X043RL0120** and save the sales order with the **Status** of **OPEN**.

Which price did the sales order take?

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1. From the form toolbar, delete the sales order and go back to the customer **ABCSTUDIOS.** On the **Delivery Settings** tab, under the **Default Location Settings,** update the **Price Class ID** to **A,** then **Save** your changes.

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Figure: Price Class ID: A

1. Open the **Sales Prices** form (AR202000; Sales Orders > Profiles) and search for the **X043RL0120** stock item, then enter yesterday’s date as the **Expiration Date** on the current sales price for **Customer Price Class A.**

Enter thenew **Customer Price Class Type** of **Price Code: A** for the **XRL-120 Laptop** with a **Price** of $2,400.00 then **Save** your changes.

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Figure: Customer Price Class for Xbox

1. Create a Sales Order – **Order Type: SO,** for Inventory ID **XBOX** for Customer **ABCSTUDIOS.**

Which price did the sales order take?

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## Discounts

We are now going to look at two ways of using discounts in MYOB Advanced:

* **Line-level discounts** that apply to a document line: These discounts may be based on the line amount or quantity of the line, they can be a percentage or fixed amount. Line-level discounts can be applied to the price of item or extended price of the item (line amount), depending on the option selected on the **Price/Discount Calculation** tab of the **Accounts Receivable Preferences** (AR101000) form.

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Figure: Accounts Receivable Preferences – Price/Discount Calculation

* **Document-level discounts** that apply to the document total: These discounts may be based on the document total, and they can be expressed as percentages or fixed amounts.

### Activity 10

We are now going to create two Line Discount Codes (customer and inventory) for 10% and 20% respectively.

1. Open the **Discount Codes** form (AP209000; Receivables > Preferences) and create 2 Discounts with the following details.

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Figure: Discount Codes

1. Open Discounts; Receivables > Profiles
2. On the **Discounts** search form (AR2095PL); click on the add new record  button on the form toolbar and enter the following discount for **Discount Code A01** and **Save** your changes.

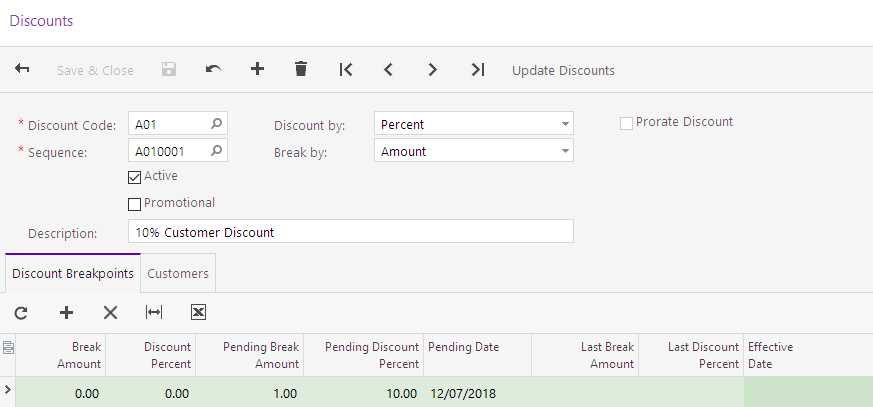


Figure: Discounts – Discount Breakpoints tab

1. On the Customers tab add ABARTENDE.

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Figure: Discounts – Customers tab

1. From the form toolbar select **Update Discounts** to apply the new discount rules. The values will move from the **Pending** to the **Actual** columns.
2. Add another discount by selecting the **Add New Record** button on the form toolbar. Setup Discount Code A02 with the following details and **Save** your changes.

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1. On the **Items** tab add **X043RL0120**.

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Figure: Discount

1. From the form toolbar select **Update Discounts** to apply the new discount rules.
2. Create a Sales Order – **Order Type: SO,** for Inventory ID **XBOX** for Customer **ABARTENDE.**

What is the discount % and discount amount?

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What information do you see on the Discount Details tab?

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