MYOB Advanced: Creating a pivot table on a generic inquiry

Overview

Functionality is available within generic inquiries to create a pivot table within the screen. In the example shown the pivot table will be based on the balance by Country.

To complete you will need to ensure that you have the roles for an Administrator and Customiser.

Step 1 – Ensure that the data is available to pivot

Select the Generic inquiry required. To be able to perform this function in the top left-hand corner will be the word "Customisation" with a drop-down box that reads "Edit Generic Inquiry" and "Pivot Tables".
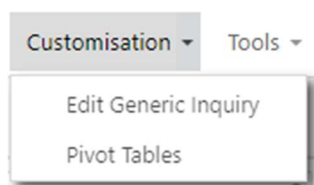
Ensure that the columns that you wish to pivot on are available. If not, then add the columns.

Once the data is available, click on "Pivot Table".

Step 2 – Create a pivot

1. In "Name" enter a name for the pivot table.

2. Select the Fields and drag to the filters into the form:

Click on save once any changes have been made and click on the "View Pivot" tab.

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

The Fields = are the fields visible to add to the pivot and replicate the columns in the generic inquiry.

The Filter, Columns , Rows and Values all work in the same way as Excel.

Properties	
Field Name	Customer.AcctName
Caption	Customer Name
Aggregate	Count All
Sort Order	Ascending
Sort By	Display Value
Show Total	☑
Collapsed	☐
Total Label	
Show Empty Value As	
Width	100
Format	

The Properties can be changed to show the data differently e.g. the value as a % or a value and if the total is shown.

In the header the form can be made into a separate screen by clicking on the "Make Visible on the UI".

☐ Make Visible on the UI

Once ticked, the fields underneath will become available, and the screen placement can be defined.

	☑ Make Visible on the UI
Site Map Title:	Customer balance by County
Workspace:	Data Views
Category:	Pivot Tables

Data Views

Inquiries	Dashboard: Project	Pivot Tables
Forecast Listing	Project Overview Dashboard	Project Balance Report 2
Item Settings		Invoices by month
MPS Listing	Dashboards	Customer balance by County
	Production Management	

Data Views
Sales Orders
Purchases
Inventory