

MYOB Advanced: Edit Menu Functions (Part 1)

Overview

Screen changes can be useful to make business processes run better for admin staff, tidy up and reduce "noise" and enable the business language to be incorporated into MYOB Advanced.

Enter "Edit Menu" Mode

To change a screen, you will need to be in that screen.

In the bottom left-hand corner of the screen , click on the three dots.

Then Click on Edit Menu

Collapse to Top

Edit Menu

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Changing the menu layout - reducing "noise"

To change a screen, you will need to be in that screen.

Payables

New Bill Rew Payment	Esupplier New Supplier		
ransactions Processes		Inquiries	Reports
Sills and Adjustments	Release AP Documents	Supplier Details	AP Balance by GL Account
heques And Payments	Prepare Payments	Supplier Summary	AP Balance by Supplier
rofiles	Process Payments / Print Cheques	Printed Forms Remittance Advice	AP Aging
uppliers	Release Payments		AP Aged Period Sensitive
redit Terms	Generate Intercompany Docume		Single Remittance Advice
	Close Financial Periods		
	Print / Email AP Remittance Advice		

Show All 🖌



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Take your business to the **next level**

Payables					Д
New Bill	E Vendor Vendor Vendor				
Select the items to be added to the qui	ck menu.				
Transactions	Processes	Inquiries	Reports	Preferences	
Bills and Adjustments	Release AP Documents	Supplier Details	AP Balance by GL Account	Accounts Payable Preferences	
Cheques And Payments	Prepare Payments	Supplier Summary	AP Balance by Supplier	Supplier Classes	
Quick Cheques	Process Payments / Print Cheques	Bills Pending Payments	AP Balance by Supplier MC	Supplier Discount Codes	
Batch Payments	Release Payments	Cheques Pending Printing	AP Open Documents by Supplier	Item Classes	
Supplier Price Worksheets	Approve Bills for Payment	Discrepancy by Account	AP Open Documents by Project		
Profiles	Generate Recurring Transactions	Discrepancy by Supplier	AP Aging		
Suppliers	Update Supplier Discounts	Discrepancy by Document	AP Aging MC		
Supplier Locations	Generate GST Debit Adjustments	Check Register	AP Coming Due		
Non-Stock Items	Generate Intercompany Docume	Printed Forms	AP Coming Due MC AD A and Devided Constitute		
Credit Terms	Validate Supplier Palances	Cheque Form	AP Aged Period Sensitive		
Supplier Prices	Validate Supplier Balances Print / Email AP Remittance Advice	Cheque Form with Remittance	Bills Pending Approval		
Supplier Discounts	E Fint / Endi A Reindance Advice	Additional Remittance Form	Bills Pending Payment		
Recurring Transactions		Remittance Advice	Payments Pending Processing		
			Cheques Pending Printing		
			Supplier Summary		
			Supplier Details		
Selecting or deselecting	Selecting or deselecting the tick boxes add the items to the view in figure 1.				
Changing the nar	rative to your	business nai	rrative		
Enter the "Edit Menu" M	ode				
			- I I		
On the selected box use	e click on the pen a	at the side of the la	abel.		
Transactions					
		-			
Bills and Adjustm	ents 🛛 🖉 🗡				
This brings up the oppor	rtunity to edit the ti	tle.			
		_			
	Item Parameters				
	Category T	ransactions	~		
	outogory.	lanoactiono			
		ills and Adjustmonte]		
	Litio.	ins and Adjustinents			
	Title: B				
	Little:	anges to the menu item wi rkspaces to which the item	ill be visible in the 1 belongs.		
	Litle: B Ch wo	anges to the menu item wi rkspaces to which the item	ill be visible in the 1 h belongs.		
	Litle: B Ch wo	anges to the menu item wi rkspaces to which the item	ill be visible in the 1 h belongs. OK CANCEL		
	Litle: B Ch wo	anges to the menu item wi rkspaces to which the item	ill be visible in the 1 n belongs. OK CANCEL		
	Little: B Ch wo	anges to the menu item wi rkspaces to which the item	ill be visible in the 1 h belongs. OK CANCEL		

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	Item Parameters			
a 9 9	Category: Title:	Transactions ✓ Enter AP Invoices Changes to the menu item will be visible in the 1 workspaces to which the item belongs.		
F		OK CANCEL		
Click on Ok.				
Transa	ctions			
Enter AP Invoices				
And then click on the E	xit Menu Editir	ng in the bottom left-hand corner.		
	DITING			
Creating a new	category	/ in the workspace		
Enter the " Edit Menu" I In the top right hand cli	Mode ck on Menu Se	ettings		
ô MENU SETTINGS ^				
Because categories are shared among workspaces, changes to categories are applied to all workspaces.				
The order in which categories are displayed in workspaces is defined in the following list. You can drag categories to change the current order.				
A category is displayed in a workspace if at least one link to a form or report has been added to the category in this workspace.				
To create a new category, click on the				



Enter the name	of the Categor	ry in the box	
	Category Pa	arameters	
	Title:		
		OK CANCEL	
	Category P	Parameters	
	Title:	Month End Process	
		Changes to the category will be visible in the 0 workspaces to which the category belongs.	
		OK CANCEL	
Click on Ok.			
To Add an Item	to the new cat ancial Periods	tegory, click on the pencil next to the menu item you wish to add.	
	Item Parame	eters	
ł	Category:	Processes ~	
	Title:	Close Financial Periods	
		Changes to the menu item will be visible in the 1 workspaces to which the item belongs.	
		OK CANCEL	





Once selected the items, Exit Menu Editing.

The selected items will appear under the new header.

Month End Process

Close Financial Periods

AP Aging

To reorder the categories in the workspace

To move the category into a difference place

Enter in the "Edit Menu" Mode

In the top right hand click on Menu Settings

🔅 MENU SETTINGS \land

Click on the category and drag to where you would like to place. In this example the Month End Process to be after Transactions.



Activities	Physical Inventory	Annual Reports	IRD
Transactions	Time Tracking	Campaigns	Payroll Tax
Configuration	Expense Claims	System Health Monitori	Email Preferences
Automated Operation	Credit Card Processing	System Maintenance	Wiki Preferences
Profiles	Row-Level Security	Timesheets	Localization
Boards and Maps	Processes	Pays	Dashboard: Finance
Bank Feeds	Requisitions	Pay Reports	Dashboards
Tasks	Process Orders	Pay Reports by ID	Privacy Tools
Email	External Tax Integration	Entitlement Reports	Pivot Tables
User Management	Budgets	Entitlement Reports by ID	Employee Self Service
Access Rights	Inquiries	Payroll Expense Alloca	Preferences
Licensing	Translation	System Processes	People Preferences
Segmented Keys	Printed Forms	System Preferences	Organization
Common Settings	Reports	Employees	Pay Item Configuration
User Preferences	1099 Reporting	Employee Reports	Government
Business Scenarios	Projection Reports	Entitlements	GL Configuration
Audit	Profitability Analysis	Superannuation	Scenarios
Schedule	Financial Statements S	Single Touch Payroll	category within category li
Replenishment	Financial Statements D	Payment Summary	Month End Proces 🖉 🗙

Activities

Transactions Month End Process Configuration

Exit Menu Editing and the Month End Process will be saved under the transactions.

Transactions

Enter AP Invoices

Cheques And Payments

Quick Cheques

Batch Payments

Supplier Price Worksheets

Month End Process

Close Financial Periods

AP Aging