

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

...

Changing the menu layout – reducing “noise”

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

Payables



Transactions

Bills and Adjustments
Cheques And Payments

Profiles

Suppliers
Credit Terms

Processes

Release AP Documents
Prepare Payments
Process Payments / Print Cheques
Release Payments
Generate Intercompany Docume...
Close Financial Periods
Print / Email AP Remittance Advice

Inquiries

Supplier Details
Supplier Summary

Printed Forms

Remittance Advice

Reports

AP Balance by GL Account
AP Balance by Supplier
AP Aging
AP Aged Period Sensitive
Single Remittance Advice

Show All ▾

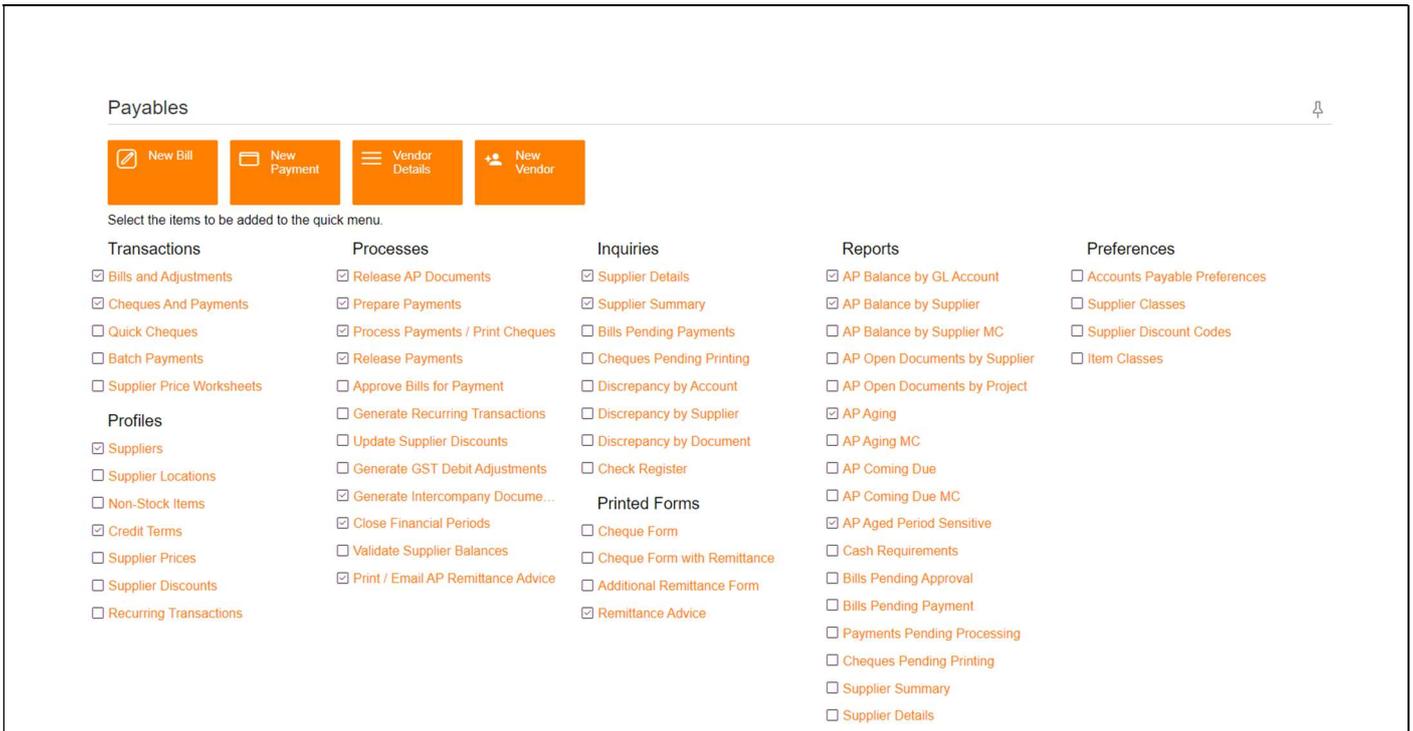


Figure 1 - View once Edit Menu clicked

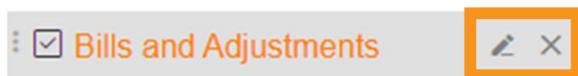
Selecting or deselecting the tick boxes add the items to the view in figure 1.

Changing the narrative to your business narrative

Enter the “Edit Menu” Mode.

On the selected box use click on the pen at the side of the label.

Transactions



This brings up the opportunity to edit the title.

Item Parameters

Category:

Title:

Changes to the menu item will be visible in the 1 workspaces to which the item belongs.

OK **CANCEL**

Item Parameters

Category: Transactions

Title: Enter AP Invoices

Changes to the menu item will be visible in the 1 workspaces to which the item belongs.

OK CANCEL

Click on Ok.

Transactions

Enter AP Invoices

And then click on the Exit Menu Editing in the bottom left-hand corner.



Creating a new category in the workspace

Enter the " Edit Menu" Mode

In the top right hand click on 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.

+ ADD CATEGORY

To create a new category, click on the

Enter the name of the Category in the box

Category Parameters

Title:

OK CANCEL

Category Parameters

Title:

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 category, click on the pencil next to the menu item you wish to add.

Close Financial Periods  

Item Parameters

Category:

Title:

Changes to the menu item will be visible in the 1 workspaces to which the item belongs.

OK CANCEL

Click on the drop box next to the Category and select the Workspace you wish to add to.

Item Parameters

Category: Month End Process

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



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	Month End Proces
Replenishment	Financial Statements D...	Payment Summary	

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