MYOB Advanced: Edit Menu Functions (Part 1)

Overview

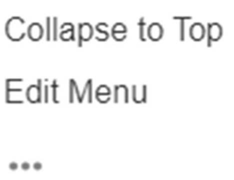
Screen changes can be useful to make business processes run better for admin staff, tidy up and reduce "noise" and enable the business language to be incorporated into MYOB Advanced.

Enter "Edit Menu" Mode

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

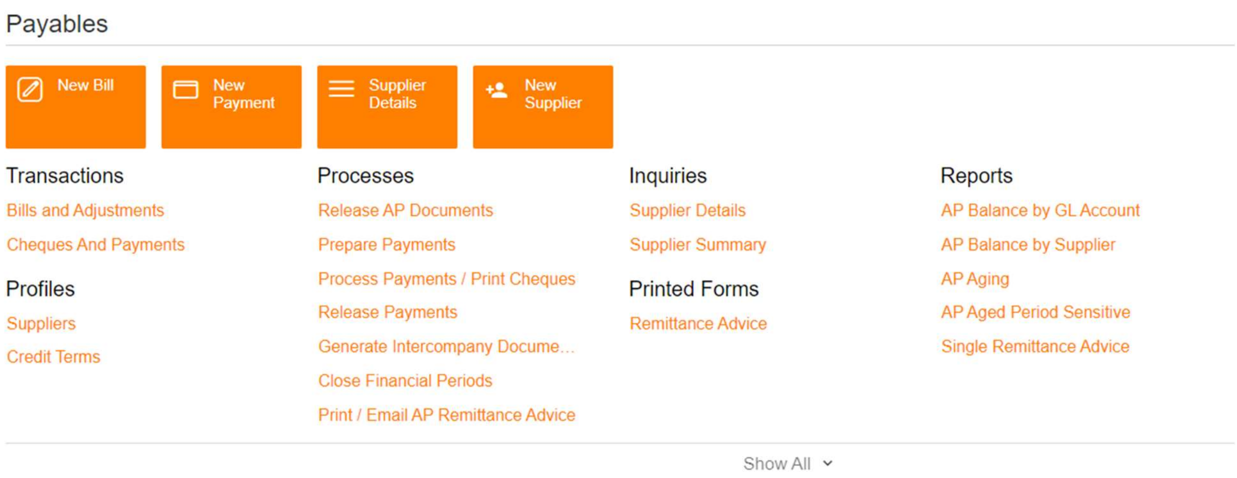
In the bottom left-hand corner of the screen , click on the three dots.

Then Click on Edit Menu



Changing the menu layout – reducing "noise"

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



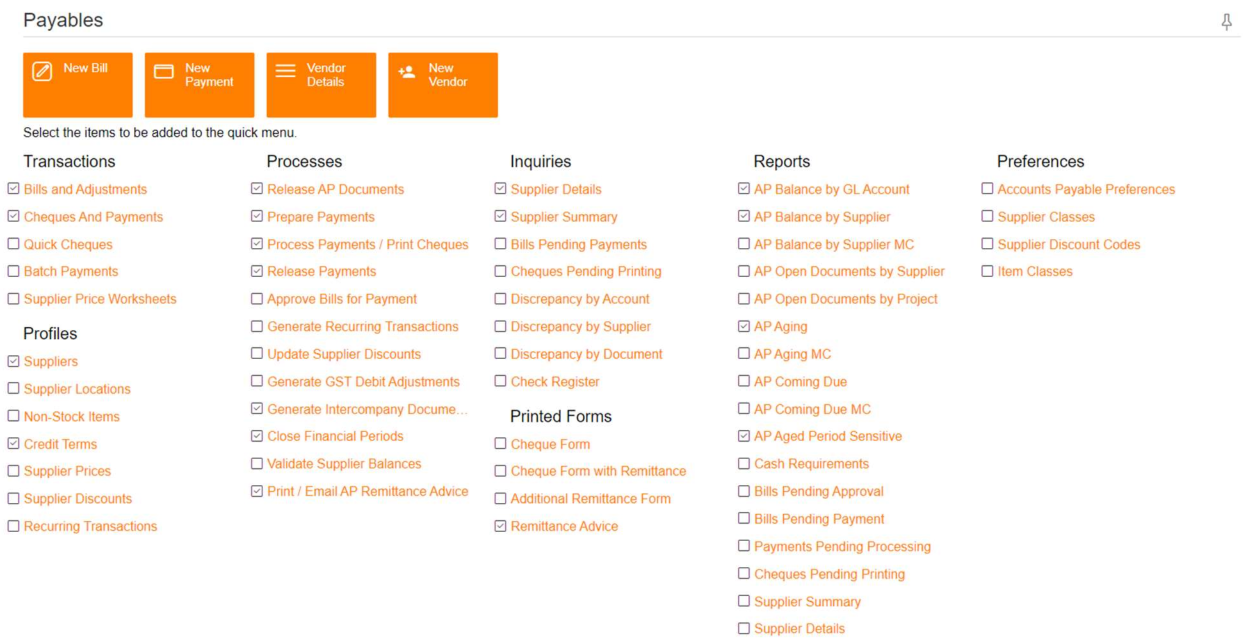


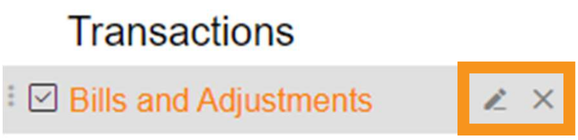
Figure 1 - View once Edit Menu clicked

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

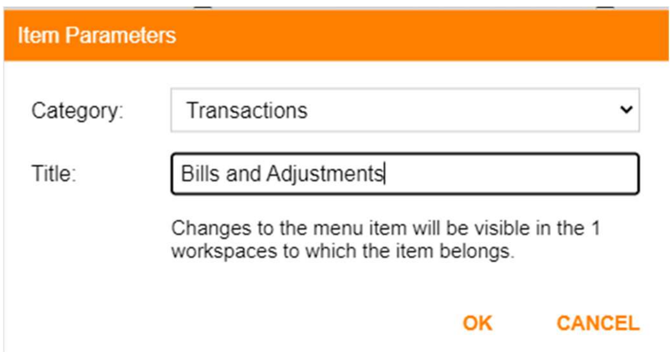
Changing the narrative to your business narrative

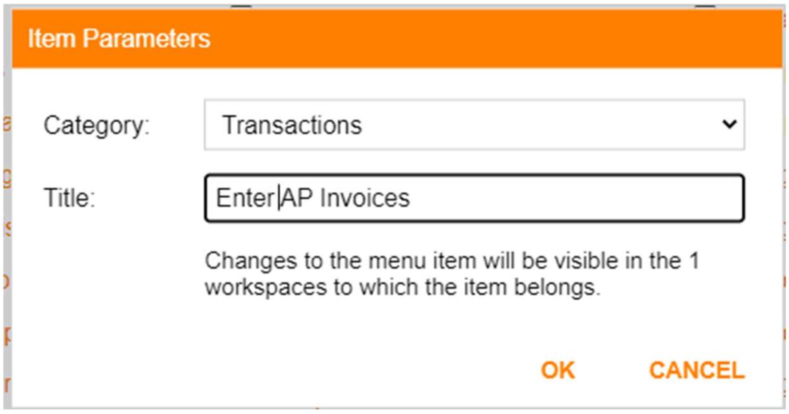
Enter the “Edit Menu” Mode.

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

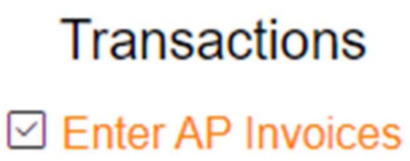


This brings up the opportunity to edit the title.

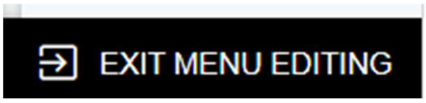




Click on Ok.



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

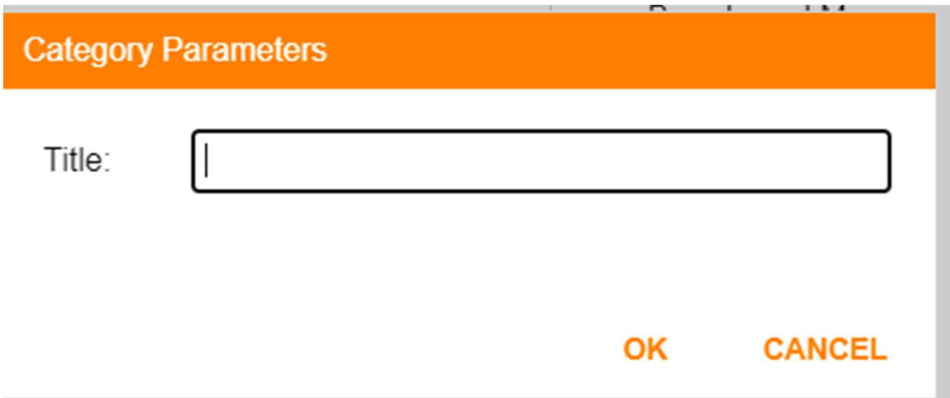
Because categories are shared among workspaces, changes to categories are applied to all workspaces.

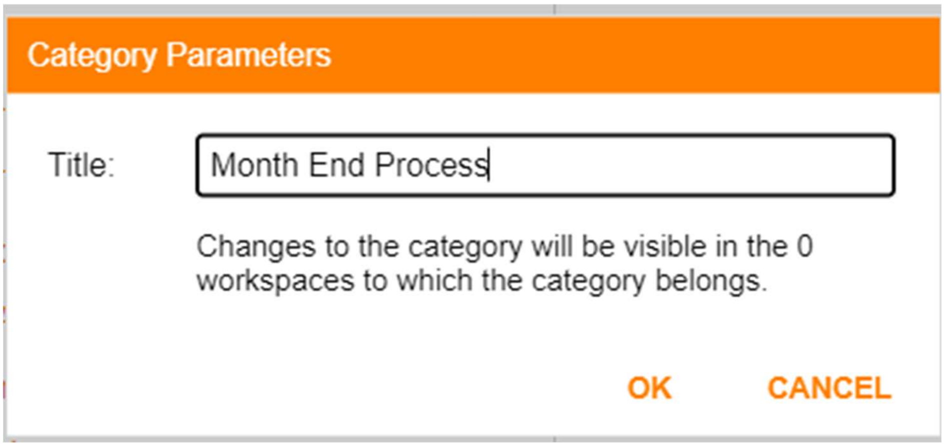
The order in which categories are displayed in workspaces is defined in the following list. You can drag categories to change the current order.

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.

To create a new category, click on the 

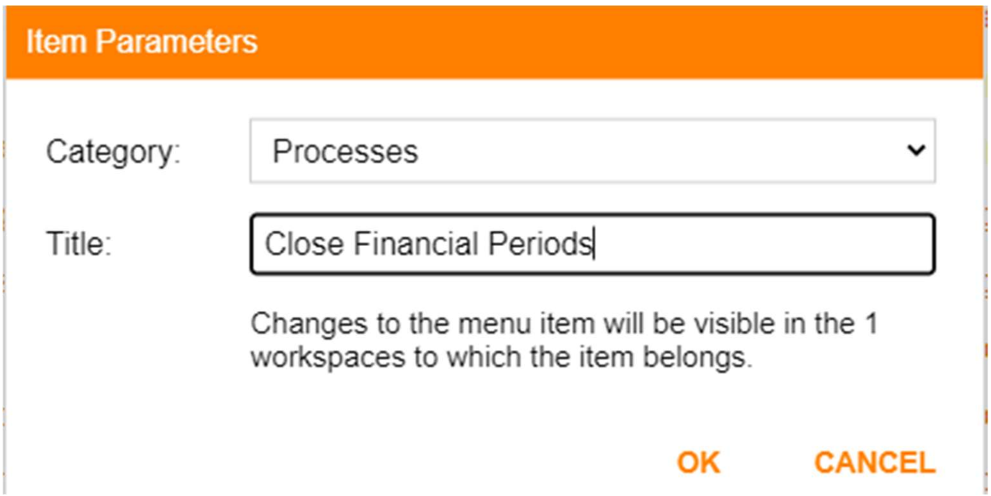
Enter the name of the Category in the box



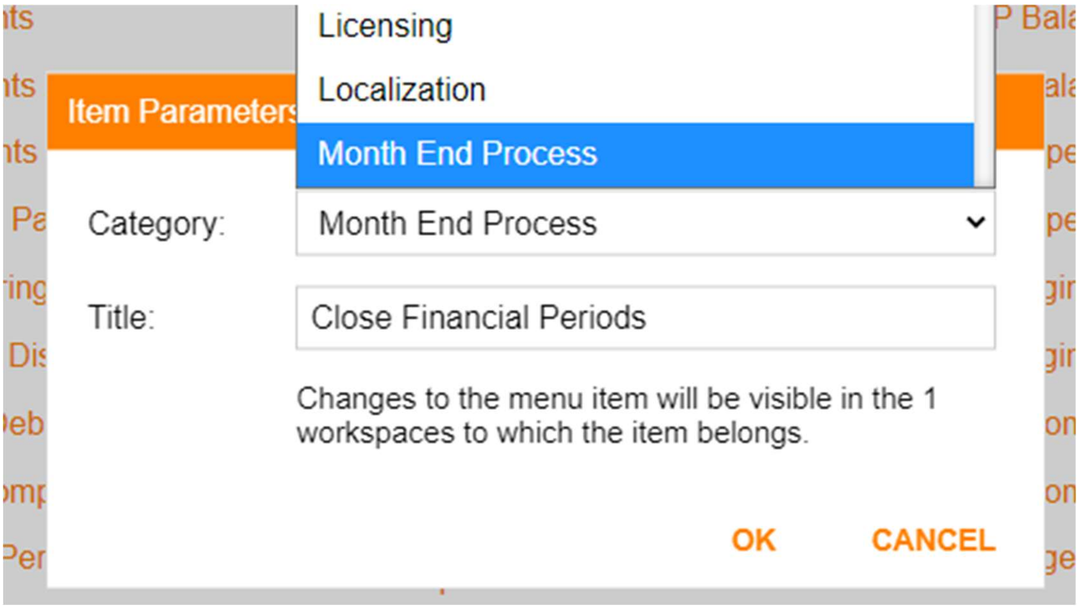


Click on Ok.

To Add an Item to the new category, click on the pencil next to the menu item you wish to add.



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



Once selected the items, Exit Menu Editing.

The selected items will appear under the new header.

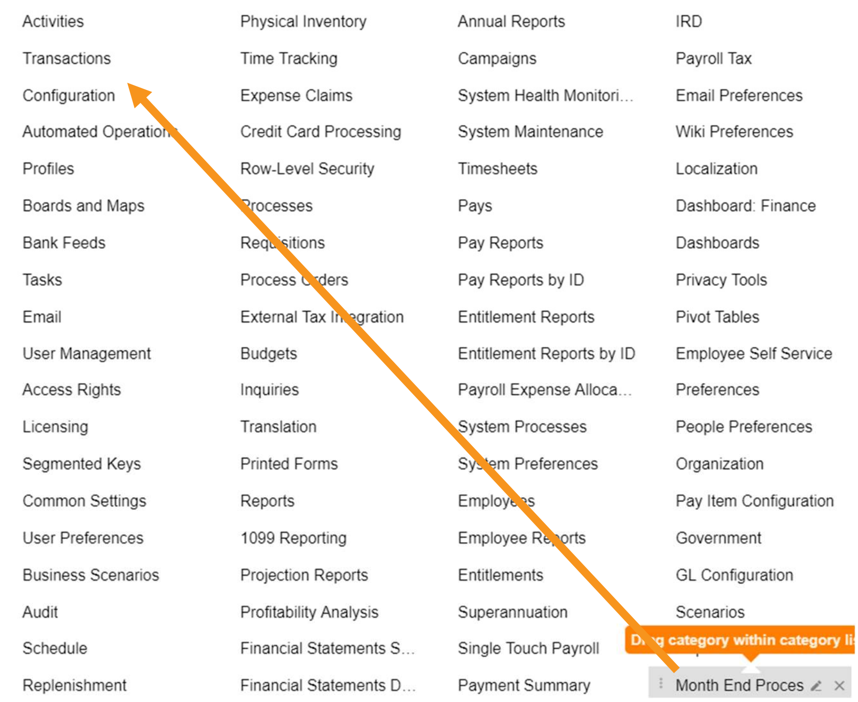
To reorder the categories in the workspace

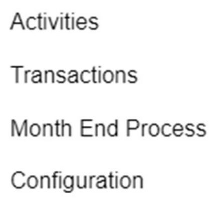
To move the category into a difference place

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.





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