

MYOB Advanced: Edit Menu Functions (Part 2)

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

...

Add Workspace

The modules on the left hand pane (Payroll, Finance etc) are workspaces. Creating a new workspace can be used for those employees who have a specific role or where a menu could be created for that person.

Once you have entered the “Edit Menu “mode”, there are three options on the top left hand of the screen. The first of these are “+Add Workspace”.

A pop-up box with Workspace Parameters appears.

Use the down arrow in icon to select an appropriate icon.

Select the Area using the down arrow.

Type in an appropriate title.

Workspace Parameters

Icon:

Area:

Title:

OK CANCEL

Using the selections and calling the Workspace “Assistant Accountant” a new blank area is created.

Production Orders

Assistant Accountant

Assistant Accountant

Select the items to be added to the quick menu.

Material Requirem...

You may need to refresh or log in and back out for changes to be seen.

Add Menu Item

The "+ Add Menu Item" can items to a new works space or an existing workspace.

Clicking on the "Add Menu Items ", pops up all the Menu Items available.

Select Forms

- ☐ Unreleased Customer Documents
- ☐ Unreleased Supplier Documents
- ☐ Income and Expenses

Data Views

Inquiries	Inquiries	Dashboards
<input type="checkbox"/> Rejected Customer Refunds	<input type="checkbox"/> Unreconciled Transactions	<input type="checkbox"/> MSS_Migrate
<input type="checkbox"/> Customers on Credit Hold	<input type="checkbox"/> Supplier Documents to Pay	<input type="checkbox"/> Tasks and Approvals
<input type="checkbox"/> Unsent Customer Documents	<input type="checkbox"/> Supplier Details	<input type="checkbox"/> Time & Expenses
<input type="checkbox"/> Unsent Customer Statements	<input type="checkbox"/> Supplier Summary	<input type="checkbox"/> New User Guide
<input type="checkbox"/> Suppliers on Payment Hold	<input type="checkbox"/> Customer Details	<input type="checkbox"/> Support Dashboard
<input type="checkbox"/> Supplier Documents to Approve	<input type="checkbox"/> Customer Summary	<input type="checkbox"/> Controller Dashboard
<input type="checkbox"/> Supplier Payments to Approve	<input type="checkbox"/> Open Sales Orders	<input type="checkbox"/> Sales Manager Dashboard
<input type="checkbox"/> Rejected Supplier Payments	<input type="checkbox"/> Open Purchase Orders	<input type="checkbox"/> Shipping & Inventory
<input type="checkbox"/> Supplier Payments to Process	<input type="checkbox"/> Income and Expenses Current Y...	<input type="checkbox"/> Sales Tasks
<input type="checkbox"/> Supplier Cash Discount to Take	<input type="checkbox"/> Income and Expenses with Perio...	
<input type="checkbox"/> Sales Profitability Analysis		
<input type="checkbox"/> Cash Summary		
<input type="checkbox"/> Cash on Hand		
<input type="checkbox"/> Storage Details		
<input type="checkbox"/> Storage Details By Item Wareho...		
<input type="checkbox"/> AR Invoices BI		
<input type="checkbox"/> Disassembly		

ADD ADD & CLOSE CLOSE

These can be selected and then added and closed.

The items will appear in the workspace.

Assistant Accountant

Select the items to be added to the quick menu.

Transactions	Inquiries	Financial Statements Summary	Dashboards	Other
<input type="checkbox"/> Transactions	<input type="checkbox"/> Reconciliation Statement History	<input type="checkbox"/> Balance Sheet	<input type="checkbox"/> Tasks and Approvals	<input type="checkbox"/> Organisation Structure
<input type="checkbox"/> Journal Transactions	<input type="checkbox"/> Bank Transactions History	<input type="checkbox"/> Balance Sheet - Comparative	<input type="checkbox"/> Financial Statements Detail	<input type="checkbox"/> Submit a Leave Request
<input type="checkbox"/> Cashbook Vouchers		<input type="checkbox"/> Profit & Loss	<input type="checkbox"/> Balance Sheet Detail	<input type="checkbox"/> Unposted GL Documents
<input type="checkbox"/> Trial Balance	<input type="checkbox"/> Reports	<input type="checkbox"/> Profit & Loss by Range Summary	<input type="checkbox"/> Balance Sheet Comparative Detail	<input type="checkbox"/> General Ledger Details
<input type="checkbox"/> Profiles	<input type="checkbox"/> Trial Balance Summary	<input type="checkbox"/> Profit & Loss - Quarterly	<input type="checkbox"/> Profit & Loss by Range Detail	<input type="checkbox"/> Company Dashboards
<input type="checkbox"/> Cash Accounts	<input type="checkbox"/> Trial Balance Detailed	<input type="checkbox"/> Profit & Loss 12 Month Summary	<input type="checkbox"/> Profit & Loss view by Subaccount	
	<input type="checkbox"/> Transactions for Period	<input type="checkbox"/> Cash Flow		

ADD ADD & CLOSE CLOSE

(NB the items can be renamed or moved ticked as instructed in part one)

You may need to refresh or log in and back out for changes to be seen.

Add Tile

The "+ Add Tile" can items to a new works space or an existing workspace. This lets you land on a form or report at the click of a button to speed up the process and can be prepopulated with information.

In the workspace you would like to tick on click on "+ Add Tile".

Use the down arrow in icon to select an appropriate icon.

Enter a Title.

On the Form select the name of the form (see below).

This can be saved and when you click on the tile out of edit mode, it will take you to a blank form.

However, to get to a form that is already prepopulated – Click on the Parameters.

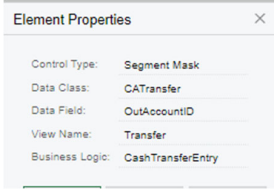
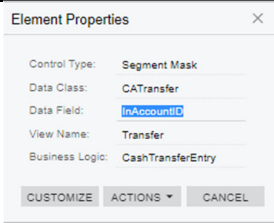
The details required need to be entered using the data from the system. It is a good idea to gather the information whilst out of edit mode, prior to setting up the tile.

The table below shows how to obtain the information.

The information to be entered into the tile parameters looks like this.

This section is Identifying the form.

Form	The form reference is found on the url from the form that you want to be in and marked as the "Screen ID" https://x.myobadvanced.com/(W(1))/Main?CompanyID=Test&ScreenId=CA301000&TransferNbr=CTF000001
&TransferNbr	Is also taken from the URL from the form https://x.myobadvanced.com/(W(1))/Main?CompanyID=Test&ScreenId=CA301000&TransferNbr=CTF000001
= <NEW>	In the url this is marked as the transaction type , however as in this case a blank document is required, then the blank document reference is entered
&OutAccountID	SOURCE ACCOUNT Click on the account and then select CTRL ALT and click on the cell.

	 <p>A pop-up box appears with the element details. The Data Field is the information required and the "&" is stating that is the field that should be populated</p>	
=11115	This is the information that needs to be entered. In this case this is the GL Account code	
&InAccountID	 <p>To populate more information, select the Data Field and add with a & and then with the data. Note that this must be done in order of population.</p>	
=10010	The data field is followed by the information to be populated.	

The end pop up box will look like this

Tile Parameters

Icon: \$ account_balance

Title: Daily Transfer

Form: CA301000 - Funds Transfers

Add optional URL parameters to apply to the selected form (see [examples](#)).
Parameters: &TransferNbr=<NEW>&OutAccountID=1

OK

CANCEL

And the parameter reads like this:

&TransferNbr=<NEW>&OutAccountID=11115&InAccountID=10010

Click on Ok and Exit Menu Editing.

You may need to refresh or log in and back out for changes to be seen.

Once logged back in the tile will be available.

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.