

MYOB Advanced 2023.1– Improvements in User Guides

Overview

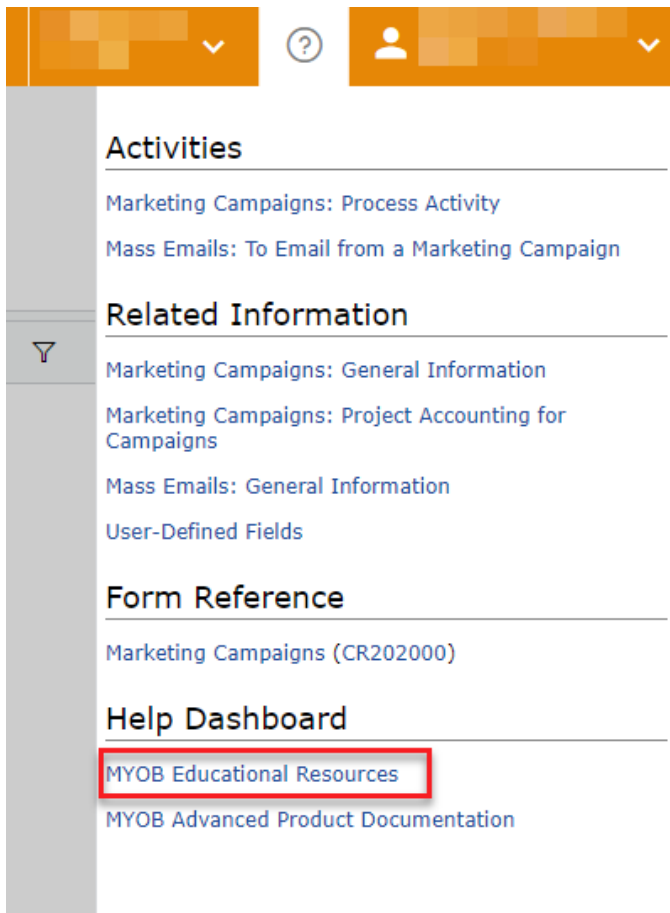
A platform as comprehensive as MYOB Advanced can inherently present complexity. Even with training in certain functions, grasping the entire system may require years. Fortunately, MYOB offers a helpful feature—a built-in help button—to assist you in training and addressing any issues.

Within the help button there are numerous user guides created to assist users navigating and using the MYOB Advanced platform. To access the user guides, follow these steps:

- 1) Click the help icon in the top right-hand corner of your screen.



- 2) Then select 'MYOB Educational Resources' under the help dashboard.



3) User guides will appear showcasing the relevant information. Each chapter of the user guide can be clicked for further information.

↳ Educational Resources

END USER				
Portal Pages <i>View to store pages that can make visible on the portal</i>	Getting Started <i>Learn how to make your job easier by personalizing MYOB Advanced ERP to support your specific work tasks and by using the system more efficiently.</i>	Financial Management <i>Find the information you need to harness the power and flexibility of MYOB Advanced ERP's broad financial management capabilities.</i>	Order Management <i>Learn how you can manage your sales-related and purchase-related activities with MYOB Advanced ERP's flexible order fulfillment processes.</i>	Inventory Management <i>Discover how to gain total control over your inventory while maintaining full transparency into stock levels.</i>
Automated Warehouse Operations <i>Explore how to streamline warehouse operations by automating picking, packaging, receiving, putting away, transferring, and counting of items.</i>	Customer Relationship Management <i>Learn how to more effectively qualify leads, manage marketing campaigns, opportunities, and customer support service.</i>	Organization Management <i>Explore how to automate time tracking, employee management, and document approval.</i>	Project Accounting <i>Learn how to monitor your expenses against your budget and track project profitability by tracking financial components for any project.</i>	Field Services <i>Read about how to enhance your customer experience by keeping a close eye on all your field operations.</i>
Contract Management <i>Learn how to configure and use customer contracts to streamline recurrent customer billing.</i>	Prices and Discounts <i>Explore how to manage customer and vendor prices, as well as to configure and apply discounts.</i>	Construction <i>This guide provides an overview of the functionality delivered with the MYOB Advanced ERP Construction Edition.</i>	Retail-Commerce <i>Learn how to set up the integration with BigCommerce and Shopify e-commerce platforms for multi-channel sales.</i>	Manufacturing Edition <i>Learn how to configure and use the manufacturing functionality delivered with MYOB Advanced ERP.</i>
Advanced Payroll <i>Learn how to set up the payroll system and process pay runs in MYOB Advanced ERP.</i>	Employee Self Service <i>The Self Service module enables employees to apply for and track their leave requests.</i>			

In **MYOB Advanced 2023.1**, multiple improvements have been made to the content and structure of the user guides that make up the documentation, as described in the following sections.

Customer Relationship Management Guide

The following changes and enhancements have been made in the Customer Relationship Management guide:

- The Managing Opportunity Reports chapter has been added, in which users will learn about opportunity- related sales metrics.
- The Managing Marketing Reports and Managing the Support Report chapters have been significantly updated.

Getting Started Guide

In the Managing Your Tasks and Events chapter, the Task Management topic has been significantly updated with regard to describing options of creation and tracking tasks.

Contract Management Guide

The Contract Management guide has been reworked and now it has the following structure:

- The Implementing the Contract Functionality chapter. In the General Information topic of this chapter, the diagram of the contract lifecycle has been reworked.
- The Setting Up and Activating Contracts chapter.

- The Managing Contracts chapter, in which a new topic about the related reports and inquiries has been added.
- The Usage of Contracts chapter.
- The Billing Contracts chapter.

Order Management Guide

In the Order Management guide, the Predefined Sales Order Types chapter has been reworked and moved to the Implementation guide. For details about order types, see Sales Order Types: General Information.