

# MYOB ADVANCED FEATURES SUMMARY

## 1. Financial Management

- 1.1. **General Ledger**- Gain access to flexible reporting and analysis at your fingertips, with General Ledger's comprehensive financial data.
  - 1.1.1. **Advanced Financial Reporting** - Distribute your reports in Excel or PDF, or publish them online. Need to segment your data? No problem. Design your financial statements using configured hierarchy and sub-account segment structures.
  - 1.1.2. **Drill Down to Original Documents** - Need to quickly gain access to your General Ledger reports? Do so easily with an array of inquiry screens and reports at your fingertips. You can even trace your transaction back to the original document - even if the transaction was created elsewhere.
  - 1.1.3. **Audit Trails** - Track all modifications to transaction history via a user ID to give you a comprehensive audit trail for all journal transactions. Notes and supporting documents can be attached directly to transactions.
  - 1.1.4. **Accounts Budgeting and Budget Approval** - Need some help with planning your budget? Grant access rights for your team members to gain their input whilst protecting sensitive information like salaries. You can even maintain different budget scenarios to help with your forecasting, and approved budgets can then be used in your analysis reports and comparative statements
  - 1.1.5. **On-The-Fly Sub-Account Entry** - Efficiently maintain your ongoing reports by creating on-the-fly subaccount segments during data entry.
  - 1.1.6. **Reversing and Auto-Reversing Entries** - Quickly and easily reverse your General Ledger transactions with just one click. You can even set the reversing entries to automatically generate when the financial period closes.
  - 1.1.7. **Flexible Configuration of Financial Periods** - A range of configuration options let you adjust your financial periods to best suit your business. Define monthly, bi-monthly, annual or custom financial periods; or keep them open as long as required to complete your data entry.
  - 1.1.8. **Multiple Currencies Support** - Manage your international business with ease with the ability to simultaneously maintain balances in base and foreign currency. See Currency Management for more details.
  - 1.1.9. **Automatic Allocation of GL Balances** - Predefine allocation rules for your balances based on percentages, quantities, statistical data and more. Once defined, use these rules to distribute account balances over multiple accounts and sub-accounts.
  - 1.1.10. **Recurring Transactions** - Setup recurring transactions based on specific schedules and time periods. Make it your own with customised design templates of expiration dates and execution schedules.

- 1.2. **Accounts Receivable** - Manage your customer accounts with automated processes to help you generate invoices, send statements, verify balances, deliver customer reports and more.
- 1.2.1. **Recurring Billing**- Easily manage recurring monthly, setup, and renewal fees with contract templates. Simply specify start and end dates, renewal terms, a billing schedule and line items. And contracts? No problem. They're linked to case management and employee time sheets for billable and customer support hours.
  - 1.2.2. **Automated Tax Reporting** - With support for multiple tax items per document line, tax on tax calculation, and the deduction of tax amount from price; automated tax reporting makes your business life easier. Automatically calculates GST to prepare for your tax filing reports.
  - 1.2.3. **Sales Commission Calculation** - Have commissions that are calculated monthly, quarterly, or annually? Need to split the commission amongst multiple salespeople? Link it to a specific invoice line item? Pay when the invoice is issued or the payment received? Make it easy with automatically calculated sales commissions
  - 1.2.4. **Customer Account Security** - Worried about account security? Gain the ability to specify which roles or individuals can view and modify customer balances and account information
  - 1.2.5. **Multiple AR Accounts in GL** - Map customer groups to different accounts to gain the option to track accounts and assignments, and apply the correct offsets at the correct time.
  - 1.2.6. **Customer Balances and Credit Limit Verification** - A range of customer configuration options let you block invoice processing or issue a warning, create messages for past-due accounts and temporarily increase credit limits. You can even automatically enforce credit limits at order entry, and invoicing.
  - 1.2.7. **Overdue Charges Calculation** - Compute overdue charges as a percentage or as a minimum charge amount, and then automatically calculate and apply.
  - 1.2.8. **Audit Trails** - Review a complete audit trail and history of all transactions at any time. With notes and supporting documents directly attached to the transaction history, all edits and modifications to records are tracked by user ID to give you a comprehensive overview of account history.
  - 1.2.9. **Multiple Currencies Support** - Work in any country with automatic currency translation and real-time adjustments based on current rates. Make your international business easy by issuing invoices and collecting payment in any currency.
  - 1.2.10. **Payment Reversal and Automatic Payment Application** - Make your payment process simple with easy voiding of incorrect payment applications, and automatically apply payments to the oldest outstanding documents.
  - 1.2.11. **Small Balances Write-Off** - Keep track of your small-document balance write-offs by controlling the maximum write-off limit and your eligible customers list.

- 1.3. **Accounts Payable** - Manage vendor invoices, optimise available discounts and deliver vendor reports anywhere, anytime. Learn how Accounts Payable can help you succeed.
  - 1.3.1. **Multiple AP Accounts in GL** - Manage multiple Accounts Payable accounts with ease by grouping suppliers to specific accounts. MYOB Advanced can even automatically offset the correct accounts for you when the payment is applied.
  - 1.3.2. **Supplier Refunds** - Easily debit cash accounts or an AP Account with supplier refund documents. You can even apply a refund toward a prepayment or debit adjustment.
  - 1.3.3. **Supplier Account Security** - Control access to sensitive supplier information with supplier account security. Have the flexibility to choose which individuals and roles can view and modify account information and balances.
  - 1.3.4. **Multiple Currencies Support** - Issue or accept invoices in foreign currency to make your international business simpler. Let the system automatically apply the effective currency rate conversions and manage any unrealised gains and losses through a balance revaluation process.
  - 1.3.5. **AP Aging Reports** - Customise your aging reports for easy visibility by including all total outstanding, past due, supplier performance and cash requirements in straightforward categories.
  - 1.3.6. **Recurrent AP Documents** - Like to make things easy? Setup recurring bills by adjusting the frequency and time frame for each payment. Recurring bills appear in the recurrent transaction processing screen for review and modification prior to release.
  - 1.3.7. **Audit Trail** - Capture the user ID every time a transaction is entered or a record is modified to maintain a complete audit trail. Correct mistakes by correcting or reversing entries, and all supporting documents can be attached directly to the transactions.
  
- 1.4. **Cash Management** - Review day-to-day transactions, fund transfer, bank account reconciliation and more via real-time customisable reports.
  - 1.4.1. **Petty Cash Management** - Easily manage your account balances and petty cash with MYOB Advanced. View date-specific transaction history at a glance, and clear and add cash transactions all from one screen.
  - 1.4.2. **Remittance and Payment Instructions** - Simplify and speed up your payment processing with pre-defined payment information for customers and suppliers.
  - 1.4.3. **Processing Centers** - Make your automated credit card processing easier by choosing the processing centers for cash collection. You can even associate certain payment methods with particular processing centers to speed up the process.
  - 1.4.4. **Multiple Currencies Support** - Maintain your cash account balances in dual currencies to make your overseas business simpler.
  - 1.4.5. **Cash Account Security** - Restrict sensitive information and prevent unauthorised access with account security that lets you control access to account information.
  - 1.4.6. **Cash Account Reporting** - Reconcile your account balances and manage your short term cash reserves with accuracy, thanks to comprehensive reporting to assist your forecasts and projections.
  - 1.4.7. **Audit Trail** - Maintain a complete audit trail that you can have confidence in. Capture User IDs for every transaction and adjustment, and attach notes directly to the transactions

- 1.5. **Currency Management** - Make managing your global business easy, with calculations and adjustments of both realised and unrealised gains and losses.
  - 1.5.1. **Revaluation of GL Accounts** - Easily adjust the value of your account base currency, and revalue any of your General Ledger accounts in a foreign currency.
  - 1.5.2. **Unlimited Currencies and Rate Types** - Do business in multiple different countries? No problem. You can support an unlimited number of currencies at one time. Want to assign different rates to suppliers and customers in the same currency? You can do that too.
  - 1.5.3. **Configurable Decimal Precision** - Different currencies work differently - have the flexibility to adjust the number of decimal places per currency.
  - 1.5.4. **Automatic Handling of Rounding Differences** - Let us do the hard work for you, with automatic computing of rounding differences that post directly to your designated General Ledger account.
  - 1.5.5. **Complete Tracking of Gains and Losses** - Keep track of you gains or losses with detailed analytical reports and subaccounts for different currencies.
  - 1.5.6. **Currency Rate Lookup** - Managing currency exchange rates is made easy with automatic lookup based on transaction date and rate types. Have the flexibility to manually override these, and receive helpful indicators if the manual rate exceeds acceptable rates of variance.
  - 1.5.7. **Historical and Auditing Reports** - Never lose your data with comprehensive reports monitoring historical performance of currency rates and revaluations.
  - 1.5.8. **Audit Trail** - Keep track of who does what with User ID tracking and notes attached directly to the transaction.
  
- 1.6. **Tax Management** - Configure, collect, manage and report your tax with flexible and centralised configuration.
  - 1.6.1. **Flexible Tax Reporting** - Retrieve tax details and generate summary reports to help you prepare the statistical information you need to file your tax reports. You can even produce GST and Business Activity Statements (BAS) as you go.
  - 1.6.2. **Tax Transactions Drill Down** - Make tax time easy with complete records of each of your transactions - including all of the details you need about reference numbers, document types, taxable amount and more.
  - 1.6.3. **Direct Tax Adjustments** - Need to make edits to your tax reports? Do it with ease directly from the Tax Management module and those corrections will flow straight through to your General Ledger and stats pages.
  - 1.6.4. **Audit Trail** - Keep track of the changes to your tax reports and store all of your notes and documents directly against the transaction records.
  
- 1.7. **Deferred Revenue Accounting** - Improve your control of revenue recognition in future periods by assigning schedules to affected transactions.

- 1.7.1. **Deferred Revenue Administration** - Templates make your day-to-day tasks easier. Create ready-to-use templates for your revenue recognition processes and link them to your accounts, sub-accounts and inventory components.
  - 1.7.2. **Component Based Revenue Recognition** - Make complex situations like included warranties simpler, with the ability to automate revenue recognition for items. Divide inventory items into component parts, and apply different deferrals to single inventory items.
  - 1.7.3. **Deferred Revenue in Multiple Currencies** - Rest easy, with all deferred revenue management functionality seamlessly integrated with your General Ledger and Currency Management.
  - 1.7.4. **Advanced Recognition Scheduling** - Schedule your revenue recognition at a time that works for you. At the start or end of a financial period, or even on a fixed day during each period.
  - 1.7.5. **Automated Reporting** - Have confidence in your reporting with automatic generation of customised reports.
  - 1.7.6. **Audit Trail** - Keep track of all edits to transactions with comprehensive audit trails. User ID tracking gives you confidence in your reports.
- 1.8. **Inter-Company Accounting** - Track financials and automate financial reporting across an unlimited number of related companies within your organisation.
- 1.8.1. **Account Based Controls** - Complex businesses have complex needs. Make it easier with the flexibility to allow inter-company transactions only for specific accounts.
  - 1.8.2. **Centralised Purchasing and Invoicing** - Integrate your Accounts Payable, Accounts Receivable, and Sales Orders in one place to allow for centralised purchases and invoicing. This allows you to purchase items and create sales orders amongst your different companies.
  - 1.8.3. **Company Bank Accounts** - Manage your purchasing and invoicing centrally, but still have company exclusive bank accounts for everyday expenditure.
  - 1.8.4. **Asset Transfers** - Assign, transfer, and track fixed assets among companies in the Fixed Asset module. You can even bring the purchase history and depreciation to the receiving company post asset transfer.
  - 1.8.5. **Account Allocations** - Make shared activities amongst companies easier with allocated transactions. Allocated transactions can even be automated according to pre-set definitions.
- 1.9. **Recurring Revenue Management** - Maximise your revenue opportunities with MYOB Advanced's improved cash flow and billing accuracy.
- 1.9.1. **Manage Complexity** - Software licenses? Subscriptions? Bundled items or Software as a service? Manage them all with flexible pricing models made to accommodate even the most complex setups.
  - 1.9.2. **Change Billing Contracts** - Change billing contracts and revenue recognition schedules mid-process with the flexibility to modify, rewrite and cancel at any time.
  - 1.9.3. **Renewals** - Increase your likelihood of renewal revenue with automated scheduling and activity management.
  - 1.9.4. **Utilise Templates** - Remove unnecessary hassle by using templates to manage different billing rules for your automated billing, allocation, and more.
  - 1.9.5. **Accurate Billing** - Rules and templates will help you not only minimise errors and improve your billing accuracy, but also improve revenue flow and customer satisfaction.

- 1.10. **Fixed Assets** - Monitor your depreciation calculations all with easy-to-use fixed asset tools
  
- 1.11. **Mobile Applications** - Access your information remotely with the MYOB Advanced mobile app – available for iOS and Android.
  - 1.11.1. **Time Reporting** - Remove the double up. Mobile time card entry will immediately feedback and update your MYOB Advanced records.
  - 1.11.2. **Approvals** - Work on the go with the ability to review and approve timesheets, expenses, sales orders, purchase orders and more via your mobile.
  - 1.11.3. **Task Management** - Keep track of your tasks with immediate updates between app events and the Customer Management suite in-product.
  - 1.11.4. **No Cost to You** - Download the app from Google Play or the Apple App Store for free today.
  - 1.11.5. **Service Case Management** - Stay in the know with service case details available wherever you are. View open service case details while on-site with clients, and record activity relating to the service case directly from your mobile app.

## 2. Inventory and Distribution

- 2.1. **Inventory Management** - Manage your distribution on the go with real-time access to available inventory, inventory in transit, inventory costs and more.
  - 2.1.1. **Lot and Serial Numbering** - Assign serial numbers upon receiving, issuing, or assembling each item - and track inventory by that serial number. You can even assign specific valuations to certain numbers in order to track costs.
  - 2.1.2. **Expiration Dates** - Reduce inventory waste with automatic issuing of earliest expiration dates, and instantly remove expired items from available inventory.
  - 2.1.3. **Transaction Reason Codes** - Create reason codes that link directly to your general ledger and inventory reports. Use these financial and operational reports to measure trends and spot problems.
  - 2.1.4. **Two-Step Transfers** - Track your inventory transfers into and out of your transit account, so you can monitor goods currently in transport between locations.
  - 2.1.5. **Inventory Bin/Location Control** - Easily maintain control over your inventory, with clear specifications around the types of transactions allowed, their priority, and cost by location.
  - 2.1.6. **Inventory Replenishment Suggestions** - Use historical sales data analysis, and system-generated replenishment recommendations, to lower your overall inventory.
  - 2.1.7. **Inventory Sub-Items** - Create sub-categories for your inventory and associate separate costs or information with each, in order to further simplify your tracking and reporting.
  - 2.1.8. **Purchase Order Automation** - Make re-ordering easy, with automatically generated purchase orders based on replenishment algorithms and your stock levels. Generated orders go directly to the vendor with the best delivery time and price.
  - 2.1.9. **Sales Order Discounts and Promotions** - Manage your discount policies and complex pricing models with ease - while still maintaining any price override policies you have in place.
  - 2.1.10. **CRM Integration** - Avoid re-entering information like price and discounts, with easy conversion of CRM opportunities to sales orders. You can even verify shipping and delivery status by locating orders.
  
- 2.2. **Sales Order Management** - Let MYOB Advanced help you manage your sales activities with integrated workflow, configurable order types, and flexible discounts and promotion.
  - 2.2.1. **CRM Integration** - Convert your CRM opportunities to sales leads without losing any of your information.
  - 2.2.2. **Purchasing Integration** - Link purchase orders with sales orders, and automatically generate new purchase orders when inventory is low. You can even hold sales orders until the purchase order is received, or drop shipments altogether.
  - 2.2.3. **Multiple and Partial Dispatching** - Manage multiple warehouses easily, with the ability to fill a sales order from multiple warehouses, or even split the order into multiple shipments from different warehouses. You can then track these partial orders and manage back order deliveries.
  - 2.2.4. **Shipment Schedule** - Produce shipment orders according to item availability or delivery schedule. Customise your delivery schedule with different delivery dates for each line item on a sales order.

- 2.2.5. **Pick List and Replenishment Orders** - Use your item availability records and warehouse location priorities to generate pick lists for your orders. Low on inventory? Auto-search other warehouses, issue replenishment orders, or even place the sales order on hold until new stock arrives.
  - 2.2.6. **Inventory Allocation** - Customise inventory allocation rules at each step of the sales process, and use those rules to warn users when inventory levels are unavailable or over-allocated.
  - 2.2.7. **Credit Limit Verification** - Perform auto credit checks prior to release of the order, and release credit hold when the order amount is decreased or payment is received.
  - 2.2.8. **Invoice Consolidation** - Make it easy, with multiple shipment orders consolidated into one invoice. If required, you can even review and update the invoice information before printing.
  - 2.2.9. **RMA and Reason Codes** - Manage any returns with reason codes and return merchandise authorization functionality. You can process return orders as credit, or a replacement of damaged goods.
- 2.3. **Purchase Order Management** - Ensure your materials are where you need them to be when you need them to be there, with a streamlined procurement process.
- 2.3.1. **Drop Shipments** - Deliver items directly to a customer location with drop shipment orders. You can then automatically release the sales order and invoice when the purchase receipt is authorised.
  - 2.3.2. **Landed Cost Functionality** - Use custom allocation methods to allocate costs with purchased items; such as additional shipping and handling costs. These landed costs are then entered into Accounts Payable and automatically included in inventory costs.
  - 2.3.3. **Supplier Selection and Performance Analysis** - Attach supplier price lists to your item descriptions, prices and delivery times - and update cost, quantities and lead times each time new inventory is received. This statistical information is then kept for replenishment calculations and supplier performance.
  - 2.3.4. **Reporting and Drill Down** - Optimise your purchasing experience with a complete set of inquiry screens and auditing reports that you can use to drill down to original transactions.
  - 2.3.5. **Audit Trail** - Keep a comprehensive record of all purchasing transactions, including all modifications and the user ID associated with each change.
  - 2.3.6. **Simplified Item Tracking** - Automatically assign lot and serial numbers upon receipt of purchase orders, to build a cross-reference item ID system between your database and suppliers.
  - 2.3.7. **Automatic Payment Vouchers** - Create accounts payable vouchers automatically whenever goods are received. You can even consolidate receipts into a single voucher, or multiple bills into a single receipt.

- 2.4. **Requisition Management** - Create and approve quotes, manage your purchases, fulfil your orders and obtain vendor bids, eliminate paperwork, all through one automated system.
  - 2.4.1. **Purchasing Integration** - Move directly from approved requisitions to creating purchase orders all within the purchase order module.
  - 2.4.2. **Predefined Request Lists** - Predefine and limit users to a specific list of inventory items in your database.
  - 2.4.3. **Hide Inventory Items** - Choose which users are able to view your product catalogue, and provide the manual item entry option instead.
  - 2.4.4. **Collect and Organise Requests** - Generate approval rules based on request amount, quantity and more. You can then bundle multiple requests into a single requisition for ease of processing.
  - 2.4.5. **Request Classes** - Reduce data entry errors by using requisition defaults. Customise your defaults to limit selection options, hide supplier or catalogue information, set lead times and much more.
  - 2.4.6. **Create Customer Quotes** - Respond to customer requests with easily generated prices and quotes.
  - 2.4.7. **Sales Order Integration** - Easily convert approved quotes into sales orders, and link to requisition for easy access and overview.
  - 2.4.8. **Complete Integration** - Automate processes and eliminate duplicate data entry with integration across all requisition, purchasing, order management, inventory management, and financial modules.
  - 2.4.9. **Audit Trail** - Keep note of the entire transaction order trail with comprehensive reporting and user ID tracking.

## 3. Customer Management

- 3.1. **Reporting & Dashboards** - Customised dashboards give insight and clarity to your reporting. Analyse trends in real-time and easily adjust your views from overall to department or function specific.
  - 3.1.1. **Business Reports Designer** - Make your reports work for you with easily customisable and visually-compelling reports on sales, forms, invoices and more.
  - 3.1.2. **Customisable by Users** - You don't need technical experience to get what you need. We make it easy with reports and dashboards completely customisable in-screen.
  - 3.1.3. **Drilldown Reporting** - Drill-down into any report to trace back to your original document or data entry.
  - 3.1.4. **Inquiries for Quick Views** - Access the information you need when you need it with access to on-screen inquiries. No need to download a report!
  - 3.1.5. **Interactive Report Viewing** - Enhance the value of reports with clickable results and interactive experiences.
  - 3.1.6. **Report Scheduling** - Find yourself needing to run the same reports over and over? Let the system do the work with scheduled reports that work to your predetermined frequencies.
  - 3.1.7. **Filters** - Avoid the clutter with filters that display only the data you want to see.
  - 3.1.8. **Microsoft Excel Integration** - Keep all of your records up to date with the ability to easily export your data to Microsoft Excel.
  - 3.1.9. **View Data Your Way** - Take your data to the next level with data visualisations. Using Open Data Interface (OData) capabilities, bring your live data to life in Microsoft Excel or PowerBI.
  - 3.1.10. **Free PowerBI Dashboards** - PowerBI content packs let you access and share your data online. Built for MYOB Advanced, PowerBI lets you access data visualisations like speedometers and maps.
  
- 3.2. **Opportunity & Pipeline Management** - Let MYOB Advanced help you improve your sales success with automation that increases efficiency and enhances information flow.
  - 3.2.1. **Opportunity Management** - Let team members collaborate on assignments, activities and deals so you never miss an opportunity. Want more? Link items to your opportunities to prevent double-entry and allow for an invoice to be quickly generated when the deal is closed.
  - 3.2.2. **Lead Management** - Never miss an opportunity with the ability to assign leads to internal and external users of the system. You can then include all sales channels in one consolidated report. Easy.
  - 3.2.3. **Approvals and Workflow** - Need to make sure your sales follow a strict approval process? Make it easy with workflow that can restrict access rights and manage approvals at every stage.
  - 3.2.4. **Email Templates** - Make emails easy with consistent templates and automatic response tracking.
  - 3.2.5. **Dashboards and Favourites** - Link your salespeople to real-time information and get them the information they need straight away. You can even set up individual personalised dashboards to meet their needs.

- 3.3. **Business Intelligence** - Bring your data together in one place for intelligence that delivers you the most insights into your business.
  - 3.3.1. **Ease to Get Started** - Connect to data from all of your applications in just a few clicks – no IT support needed. The best bit? It's easy. It's fast. And it's free.
  - 3.3.2. **One Location** - No need to search around, take the information from all of your different systems and consolidate it all into one place.
  - 3.3.3. **Real-Time** - Never lose track of your business with a live dashboard updated with all of the information important to you.
  - 3.3.4. **Visualise** - Make business intelligence easy with multiple display options and free-form drag-and-drop interaction.
  - 3.3.5. **Reporting** - Now that your data is all together, turn it into a rich interactive report with just a few clicks.
  
- 3.4. **Integrated Marketing** - Segment your database, manage online campaigns, and measure performance all with MYOB Advanced integrated marketing.
  - 3.4.1. **Lifecycle Management** - Never lose track of a customer as you monitor their progress through the prospecting, closing, and up-selling stages. You can even keep a complete history of communication as a reference point to eliminate any future confusion.
  - 3.4.2. **Integrated Financial Application** - Combine and integrate your marketing activities, billing, and financial data in one place to help you determine the response and profitability of your marketing campaigns.
  - 3.4.3. **Online Marketing** - Capture leads from your website, direct mail, online advertising and more with the ability to create customised landing pages to suit your campaign.
  - 3.4.4. **Segmentation Tools** - Collect information to effectively target different market segments with different lead types, and use custom-defined attributes to target your clients with customized campaigns.
  - 3.4.5. **Campaign Management** - Keep track of your campaigns and their revenue and costs with specific lists and criteria from your prospects, leads, contacts and customers.
  - 3.4.6. **Dashboards and Favourites** - Match marketing managers with customised dashboards and the real-time information they need to excel day-to-day.
  - 3.4.7. **Partnership Marketing** - Control leads within your organisation or to external partners with a 'parent account' that allows visitors to view only the select information that you want to share.
  
- 3.5. **Service & Support Automation** - Integrate your service and support activities with your sales and marketing so that you can focus on improving your customer service and increasing your sales margins.
  - 3.5.1. **Lifecycle Management** - Maintain a complete history of customer communications with tracking throughout the prospecting, closing, and up-selling stages.
  - 3.5.2. **Team Troubleshooting** - Work better with team collaboration. Assign cases to a workgroup without having to email case history or documents.

- 3.5.3. **Email Management** - Reduce inefficiencies and maintain consistency with email templates to address common problems.
  - 3.5.4. **Workstation Flexibility** - Experience ultimate flexibility for your service staff with user-defined views of tasks, cases and appointments no matter what browser they use.
  - 3.5.5. **Dashboards and Favourites** - Create dashboards for each service manager with real-time information and announcements that can be displayed in graphical or tabular views.
  - 3.5.6. **Case Management** - Establish workflow based on escalation paths, and mark priorities that can send automatic reminders to important parties. You can even link case-related information directly to activities, events, and tasks; and make the information available to any authorised stakeholders.
- 3.6. **Customer Self-Service Portal** - Provide your customers with 24/7 access to their account information, and share your knowledge base to help reduce customer support questions.
- 3.6.1. **Customer Self-Service Capability** - Give your customers ease of access to the information they need, when they need it, with a self-service portal. They can access account information, create and manage support cases, and create and track online orders, without even needing to call your service personnel.
  - 3.6.2. **Self-Update of Customer Information** - With online self-service access to their account information, customers can view and update their address and contact information at all times.
  - 3.6.3. **Financial Overview** - Through the self-service portal customers can see their historical documents and transactions, as well as due dates, and amounts due.
  - 3.6.4. **Case Management** - Let customers view the cases they have submitted, track their progress, reopen closed cases and provide additional information with case management that seamlessly flows into your software.
  - 3.6.5. **Online Ordering** - Browse inventory and place orders online at any time. Your customers can even track the order status, shipment, and view the invoice all from their customer portal.
  - 3.6.6. **Online Catalogue** - Control which products are visible to each user in your online catalogue and what information and images that user sees, as well as what warehouses products are shipped from.
  - 3.6.7. **Up-to-date Pricing and Inventory Details** - Connected directly to your overall database, you can be sure that your inventory and pricing is always up to date.
  - 3.6.8. **Document Sharing** - Share your documents and important information with customers in a secure location, without needing to build a separate webpage.
  - 3.6.9. **Knowledge Base** - Host and support information to help customers troubleshoot their issues and find resolutions. With articles created and published by your support professionals, you can ensure that your customers can find the answers they need for any of their FAQs.

## 4. Project Accounting

- 4.1. **Project Cost Tracking** - MYOB Advanced makes it easy for you to manage your projects with a single location to track all costs, revenues and budgets for your projects.
  - 4.1.1 **Resource Management** - Establish billing rules and assign resources to projects and tasks, including project managers, employees and machines.
  - 4.1.2 **Task Definition** - Generate expected revenue in project budgets by defining tasks to individual projects or globally, and assign billing rates by individual, job role, or project.
  - 4.1.3 **Easy to Update Tasks** - Fully integrated modules allow you to easily add activities through CRM or whilst in project.
  - 4.1.4 **Allocate Expenses** - Create formulas that include billable and non-billable items and allow you to allocate shared and overhead expenses to individual projects.
  - 4.1.5 **Templates for Projects and Tasks** - Use master templates to create new projects that specify the people, equipment, billing and budgets involved.
  - 4.1.6 **WIP Support** - Keep projects on budget and don't lose track of expenditures by tracking accumulated un-billed costs.
  
- 4.2. **Advanced Billing** - Flexible billing arrangements let you bill materials and labour based on the type of work performed, project requirements, or even who the customer is.
  - 4.2.1 **Automated Billing** - Reduce errors and improve cash flow with automatically generated invoices and defined project billing parameters.
  - 4.2.2 **Multiple Rates** - Get flexible billing for specific tasks or projects with multiple rates tables.
  - 4.2.3 **Billing Periods** - Suspend posting of timesheets and expenses until released, and bill projects or customers on custom, weekly, monthly or quarterly cycles.
  - 4.2.4 **Billing Mark Up** - Vary markups according to labour or service type, and apply at the customer level for maximum flexibility.
  - 4.2.5 **Reverse Un-Billed Transactions** - Use automatic reversal and invoice regeneration to correct improperly applied charges to the billing transaction.

- 4.3. **Time & Expense Management** - Have your employees, partners and contractors log timesheets anytime, anywhere. Simplify the time and expense entry process with MYOB Advanced.
  - 4.3.1 **T&E Reporting Anywhere** - Report easily and conveniently at any time through browser or app, and improve the accuracy and timeliness of your expense reporting.
  - 4.3.2 **Timesheets Entry** - Connect specific projects and budgets directly to your timesheets.
  - 4.3.3 **Accurate Labour Assignment** - Assign labour hours to specific projects and tasks that feed directly to your database to make labour accounting easy.
  - 4.3.4 **Approvals** - Customise workflow to move items through a specified approval process. Approved items can generate corresponding project transactions or invoices and can even be posted to specific cases, customers, contracts or projects.
  - 4.3.5 **Audit Trail** - Maintain a comprehensive audit trail with complete tracking of user adjustment to records.