



**BUILDXACT**

# Connecting Buildxact with MYOB



USER HELP GUIDE - 2018

## CONTENTS

Introduction .....	3
Connecting.....	3
Help selecting the right MYOB accounts .....	6
Expense account (purchasing) .....	6
Income account (client invoicing).....	7
Syncing with MYOB.....	8
When does Buildxact need to sync?.....	8
How to sync?.....	8
How do I know whether my sync has worked? .....	9
What does my info look like in MYOB? .....	11
Purchasing items.....	11
Client invoice items .....	13
Frequently asked questions (IMPORTANT).....	15
Further assistance.....	15

## Introduction

This document will show you how to connect Buildxact with MYOB Account Right Live (referred to as "MYOB") as well as what information looks like in MYOB when transferred.

## Connecting

### STEP 1

Login in Buildxact and go  
My account > Integrations

### STEP 2

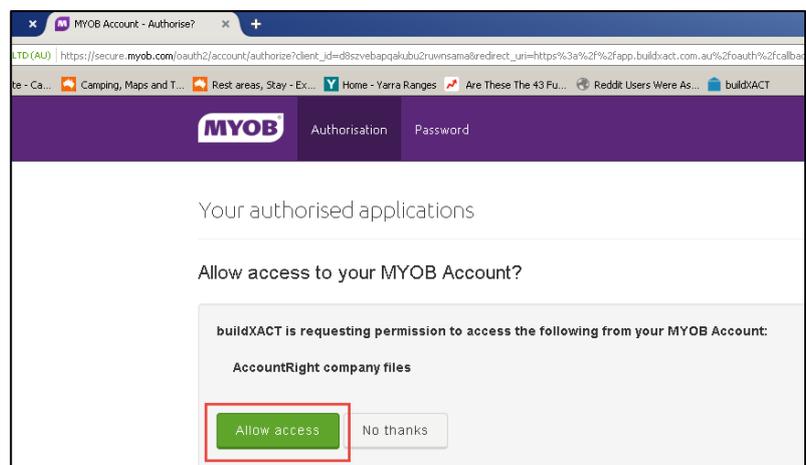
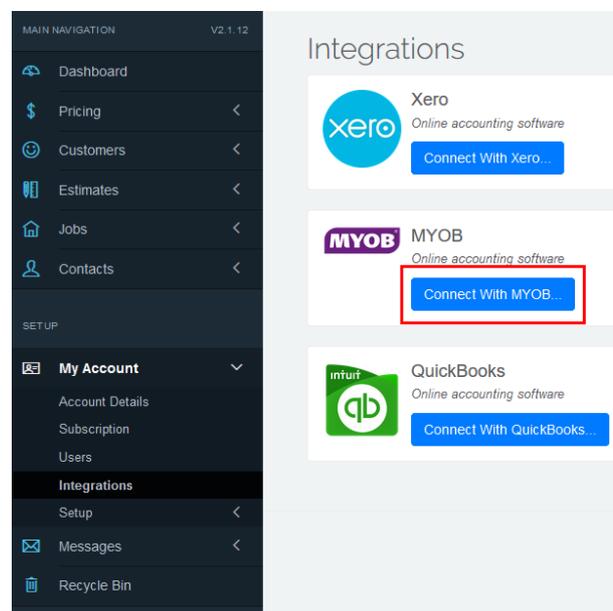
Click 'Connect with MYOB' to connect.

### STEP 3

You may need to enter your  
login details for MYOB, if not  
ignore this step.

### STEP 4

Click Allow Access to confirm  
you want to connect Buildxact  
and MYOB



## Connecting Buildxact with MYOB

User Help Guide 2018

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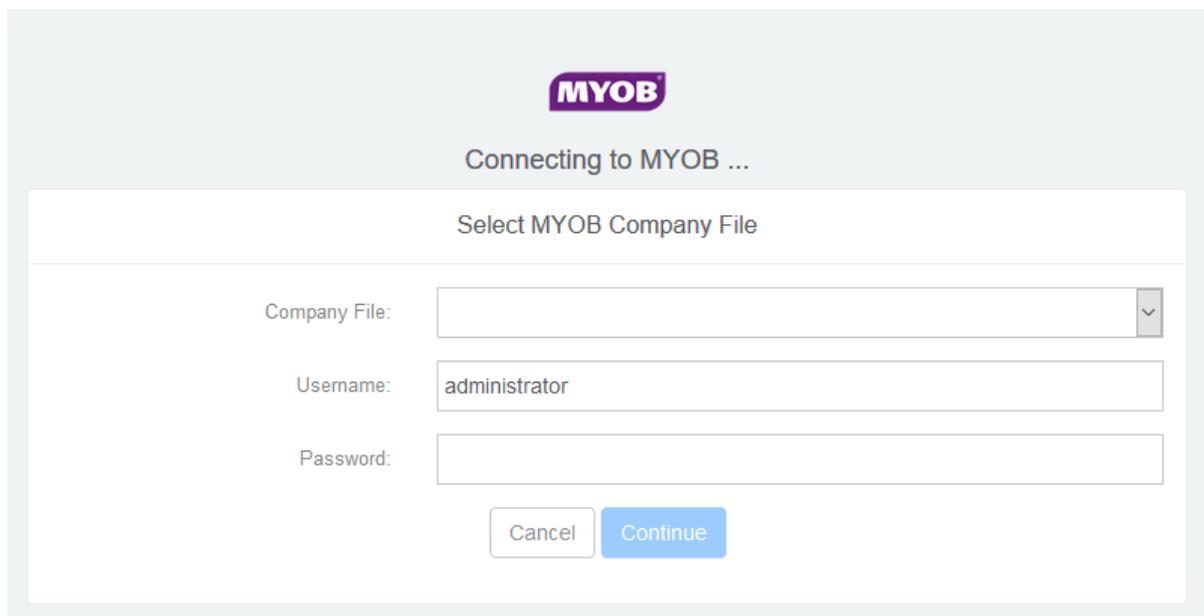
### STEP 5

Once back in Buildxact you'll need to wait a second while organisation details are brought across.

### STEP 6

Then you'll need to enter the details for your **company file** (ie: this is not your login to MYOB itself but the login to the file for that company).

**TIP:** Unless you've changed yours it is most likely administrator with a blank password.



### STEP 7

All done, time to confirm a few details.

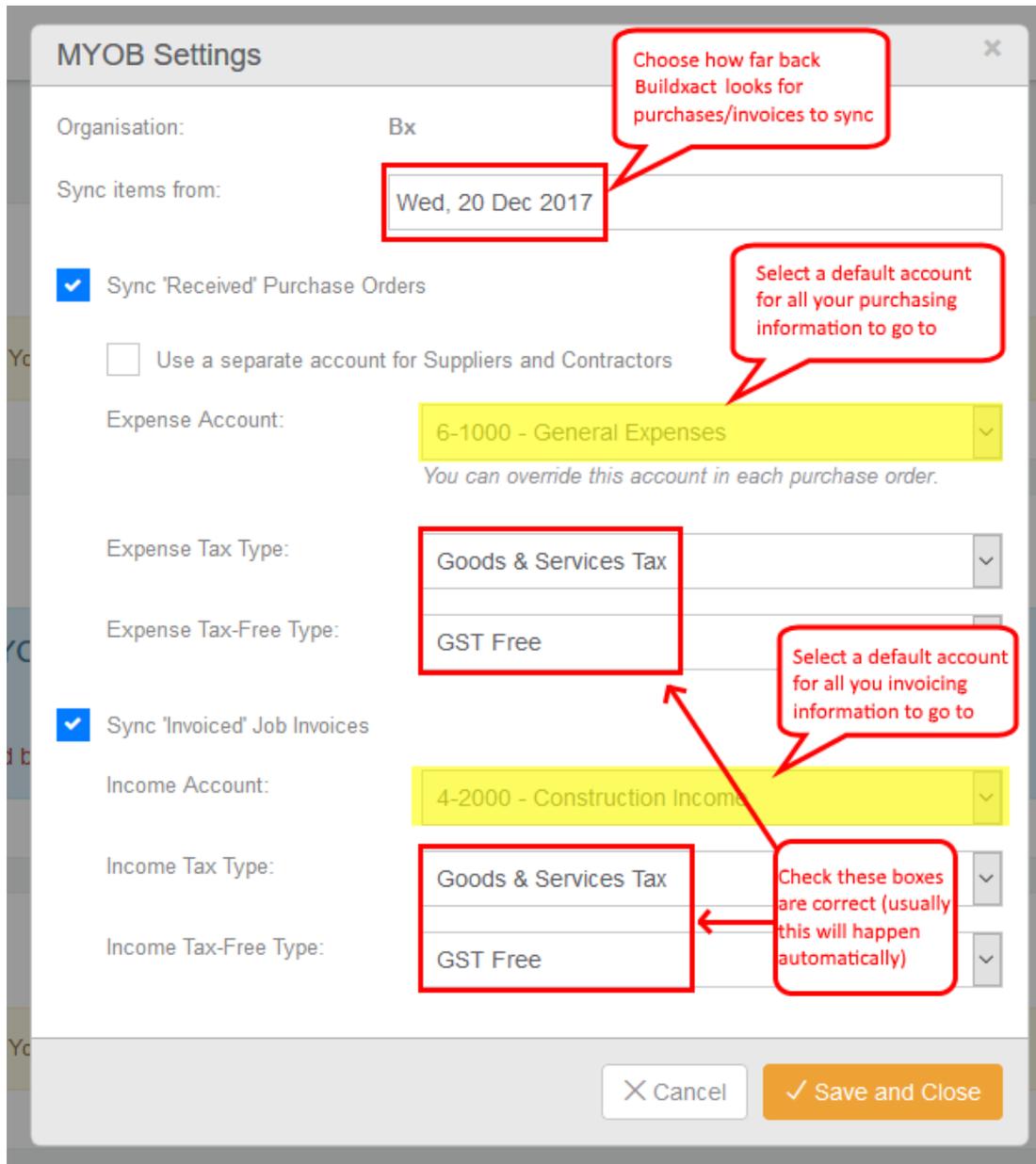
### STEP 8

Now we just need to set a few things, highlighted items in the image below are ones you'll have to set. Items in a red box can be changed if needed, but you'll only need to change these if they are wrong.

**TIP:** For help selecting the right account see the "Help selecting the right MYOB accounts" section (page ??).

## Connecting Buildxact with MYOB

User Help Guide 2018



**MYOB Settings**

Organisation: Bx

Sync items from: Wed, 20 Dec 2017 Choose how far back Buildxact looks for purchases/invoices to sync

Sync 'Received' Purchase Orders

Use a separate account for Suppliers and Contractors

Expense Account: 6-1000 - General Expenses Select a default account for all your purchasing information to go to

You can override this account in each purchase order.

Expense Tax Type: Goods & Services Tax

Expense Tax-Free Type: GST Free

Sync 'Invoiced' Job Invoices

Income Account: 4-2000 - Construction Income Select a default account for all you invoicing information to go to

Income Tax Type: Goods & Services Tax

Income Tax-Free Type: GST Free Check these boxes are correct (usually this will happen automatically)

X Cancel
✓ Save and Close

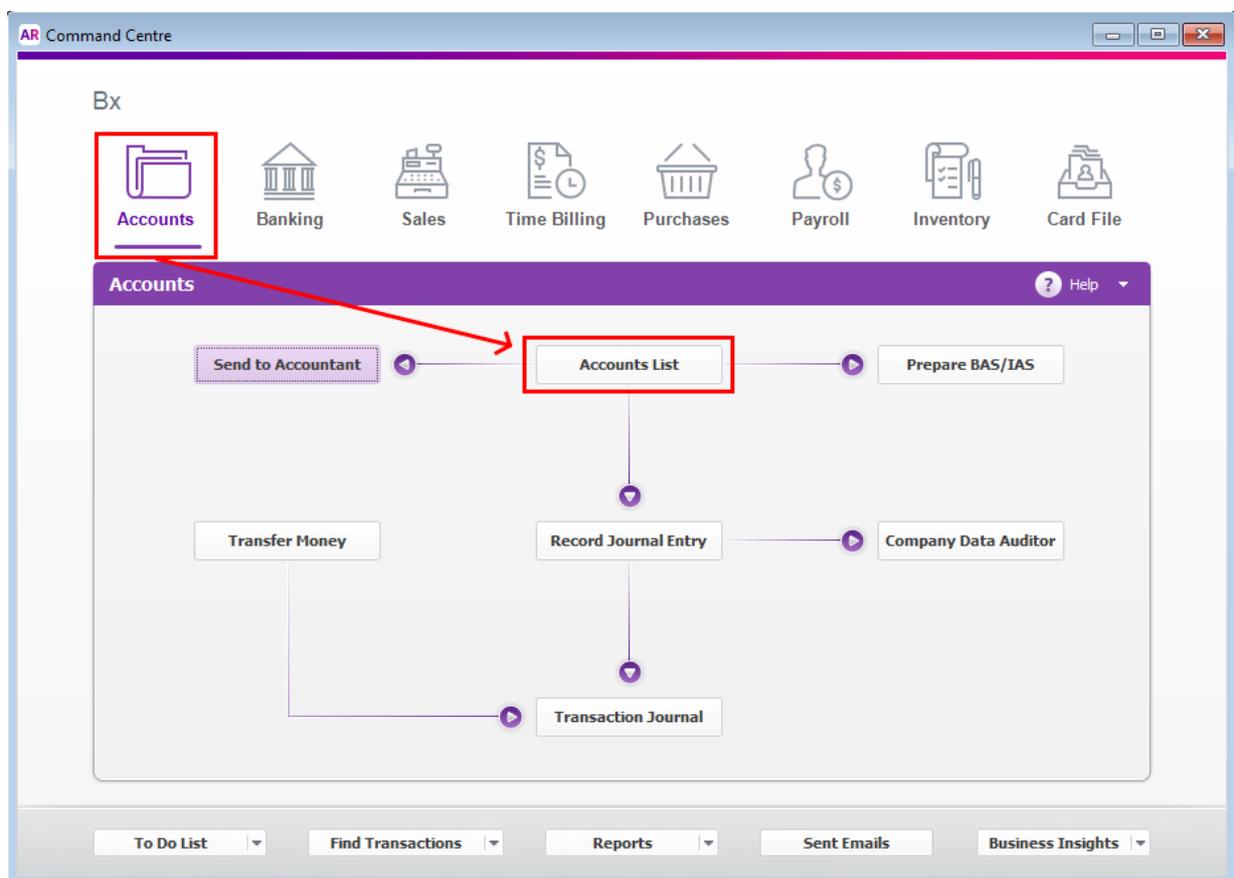
### STEP 9

Check everything is working properly by performing a sync. Head to the “Syncing with MYOB” section (page ??) of this document for info on how to do this.

## Help selecting the right MYOB accounts

This section will help aid your decision in selecting the right to accounts (in XERO) for your purchase and client invoice information.

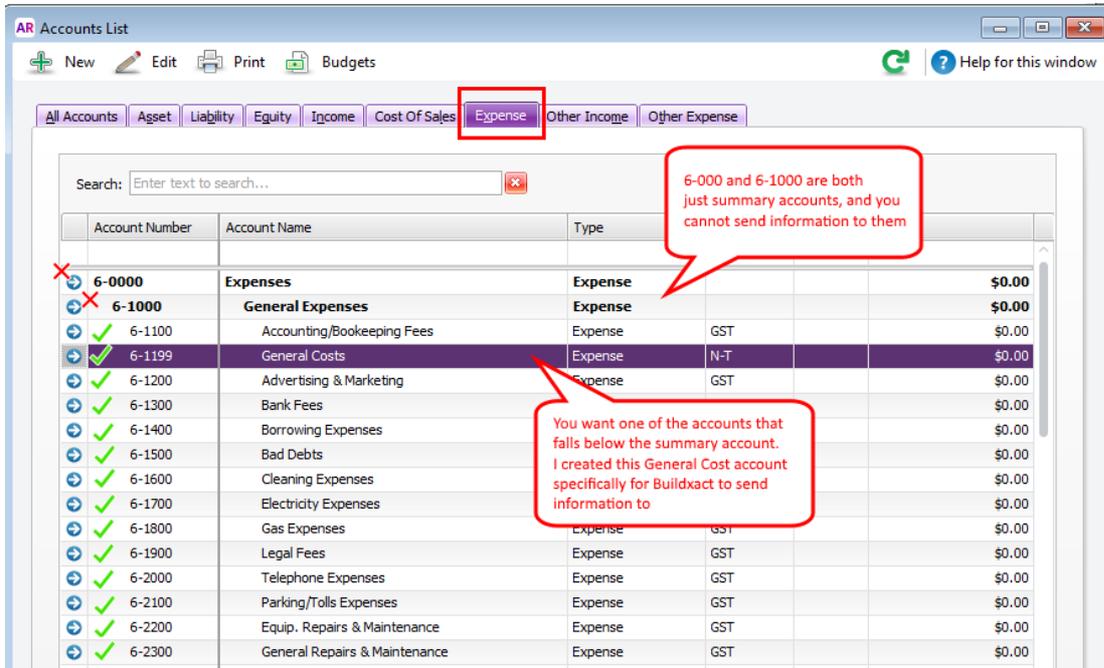
To see which accounts you can use head to MYOB and into your accounts list.



### Expense account (purchasing)

First of all the accounts to which you'll send purchase information, by definition this is an "expense" account. Below are ticked and crossed suitable and not suitable accounts within my MYOB account.

## Connecting Buildxact with MYOB User Help Guide 2018



AR Accounts List

Search: Enter text to search...

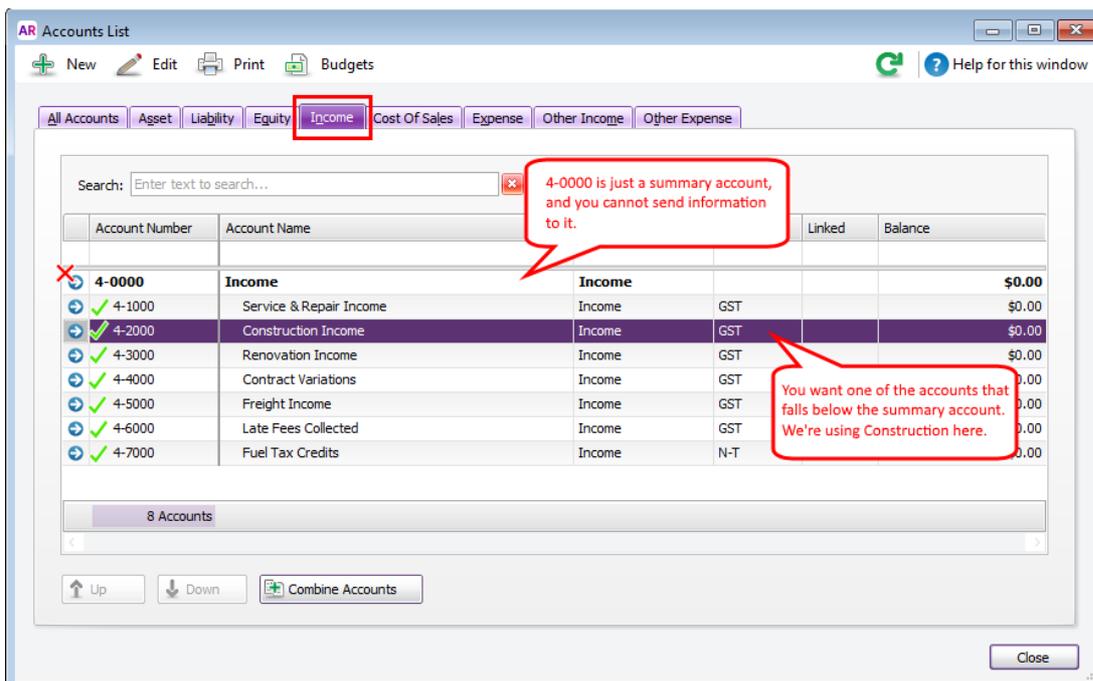
Account Number	Account Name	Type	Balance
6-0000	Expenses	Expense	\$0.00
6-1000	General Expenses	Expense	\$0.00
6-1100	Accounting/Bookkeeping Fees	Expense GST	\$0.00
6-1199	General Costs	Expense N-T	\$0.00
6-1200	Advertising & Marketing	Expense GST	\$0.00
6-1300	Bank Fees		\$0.00
6-1400	Borrowing Expenses		\$0.00
6-1500	Bad Debts		\$0.00
6-1600	Cleaning Expenses		\$0.00
6-1700	Electricity Expenses		\$0.00
6-1800	Gas Expenses	Expense GST	\$0.00
6-1900	Legal Fees	Expense GST	\$0.00
6-2000	Telephone Expenses	Expense GST	\$0.00
6-2100	Parking/Tolls Expenses	Expense GST	\$0.00
6-2200	Equip. Repairs & Maintenance	Expense GST	\$0.00
6-2300	General Repairs & Maintenance	Expense GST	\$0.00

6-000 and 6-1000 are both just summary accounts, and you cannot send information to them

You want one of the accounts that falls below the summary account. I created this General Cost account specifically for Buildxact to send information to

### Income account (client invoicing)

Secondly, the accounts to which you'll send client invoice information to, by definition this is an "income" account. Below are ticked and crossed suitable and not suitable accounts within my MYOB account.



AR Accounts List

Search: Enter text to search...

Account Number	Account Name	Type	Linked	Balance
4-0000	Income	Income		\$0.00
4-1000	Service & Repair Income	Income GST		\$0.00
4-2000	Construction Income	Income GST		\$0.00
4-3000	Renovation Income	Income GST		\$0.00
4-4000	Contract Variations	Income GST		\$0.00
4-5000	Freight Income	Income GST		\$0.00
4-6000	Late Fees Collected	Income GST		\$0.00
4-7000	Fuel Tax Credits	Income N-T		\$0.00

4-0000 is just a summary account, and you cannot send information to it.

You want one of the accounts that falls below the summary account. We're using Construction here.

8 Accounts

Up Down Combine Accounts

Close

## Syncing with MYOB

This section will show you the two different ways to prompt Buildxact to sync with MYOB, how to know if it is ready to sync, and how to know the results of a sync.

### When does Buildxact need to sync?

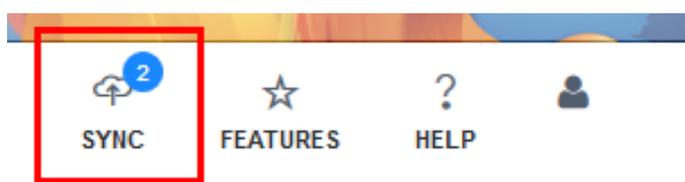
Buildxact will want to sync (send information to MYOB) when there are purchase orders which are marked as received, or invoices marked as invoiced (or received) which have not previously been synced (sent across).

Order # ⇅	Description ⇅	Supplier # ⇅	Supplier	Created ▾	Required ⇅	Total (Ex) ⇅	Status ⇅
0001	Building Supplies		Bunnings	Dec 20, 2017	Jan 16, 2018	\$2,000.00	Received

Invoice # ⇅	Description ⇅	Invoiced ▾	Due ⇅	Contract % ⇅	Contract (Ex) ⇅	Variations (Ex) ⇅	Total (Ex) ⇅	Status ⇅
0001	Deposit	Dec 20, 2017	Jan 3, 2018	10.00	\$250.00	\$0.00	\$250.00	Invoiced

You'll know Buildxact has items ready to sync when you see a sync icon at the top of the screen. The icon will also display the number of items ready to sync, as shown below:

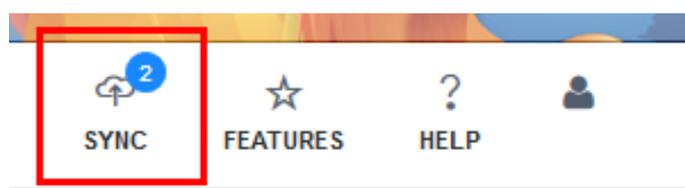


### How to sync?

There are two ways to do this:

#### OPTION 1

Click the sync icon at the top of the screen



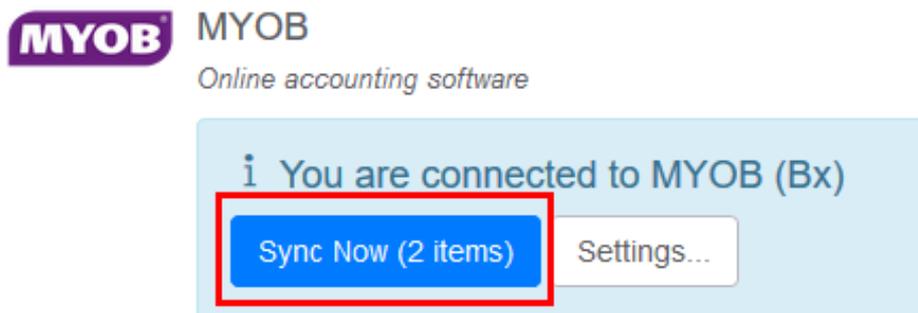
## Connecting Buildxact with MYOB

User Help Guide 2018

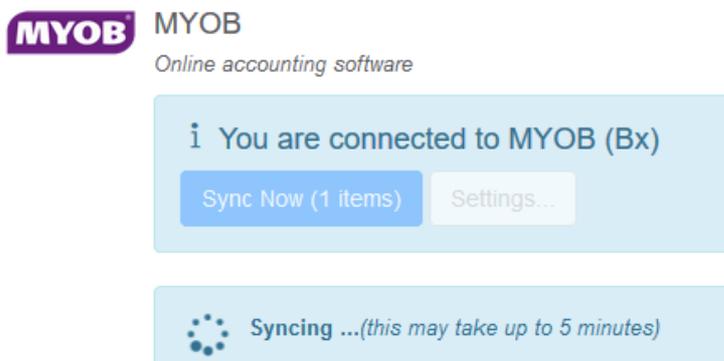
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### OPTION 2

Click Go to My Account > Integrations, and click the Sync Now button under MYOB



Either way you'll be given this message and a sync (send of information) will occur in the next five minutes.

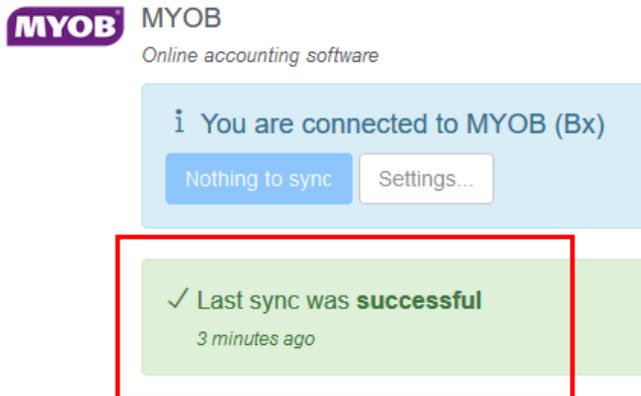


### How do I know whether my sync has worked?

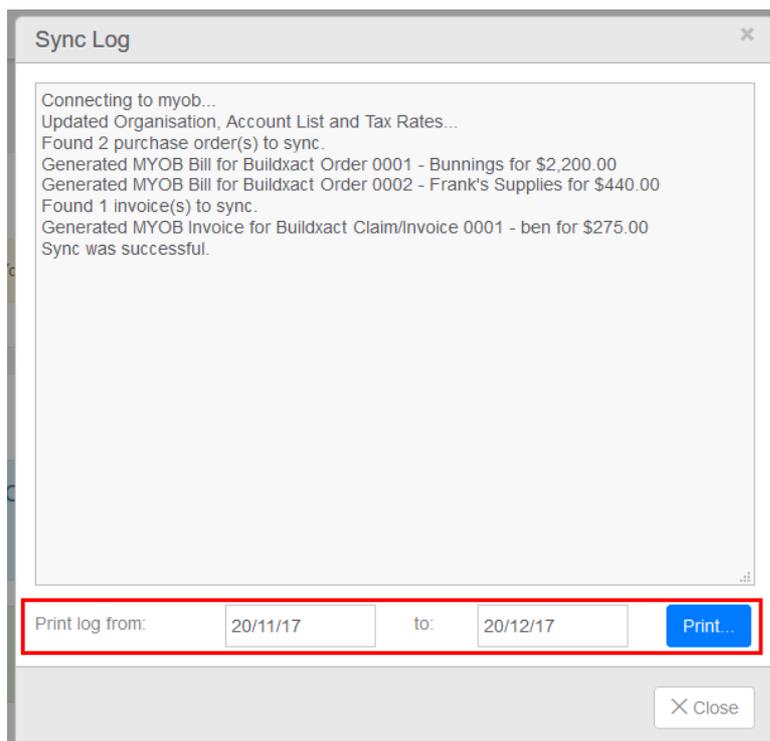
Within My Account > Integrations you will see 'Last sync was successful'. Click on 'View Log' for detailed information on the most recent sync.

## Connecting Buildxact with MYOB

User Help Guide 2018



For detailed information on all syncs, click on 'Print' to generate a full report for the selected date range.

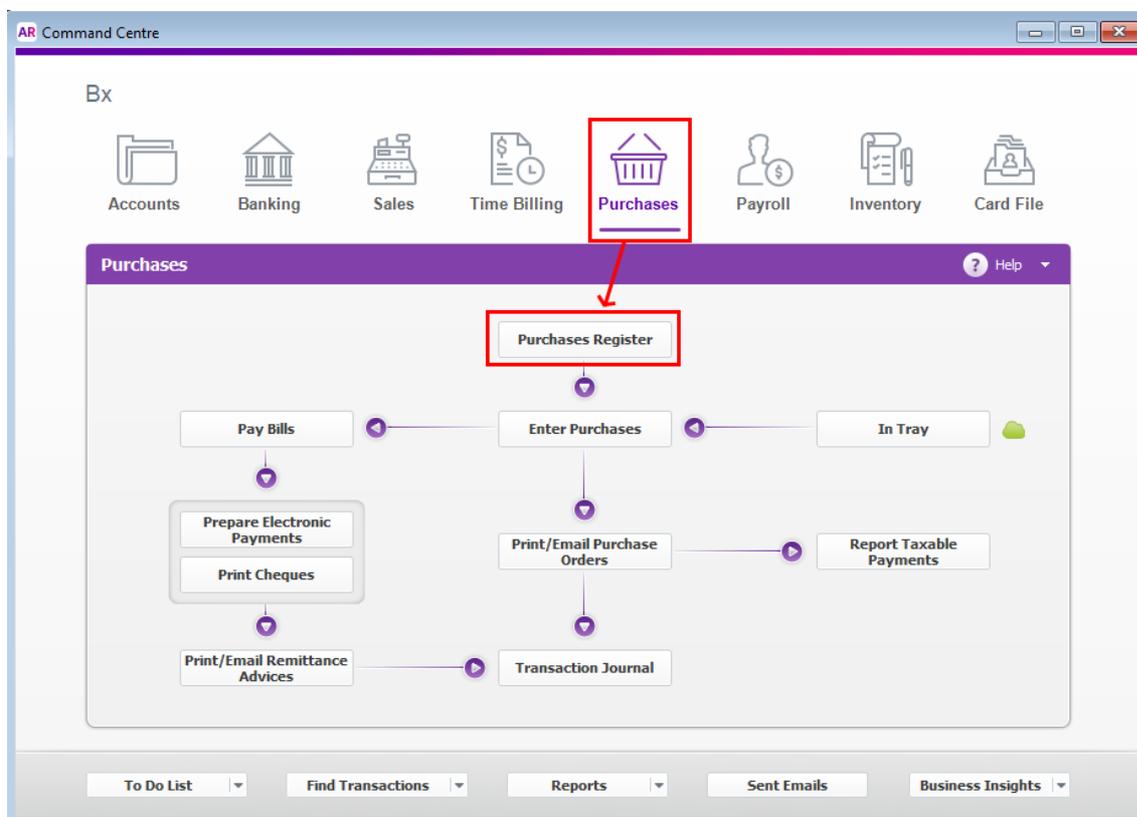


## What does my info look like in MYOB?

### Purchasing items

#### STEP 1

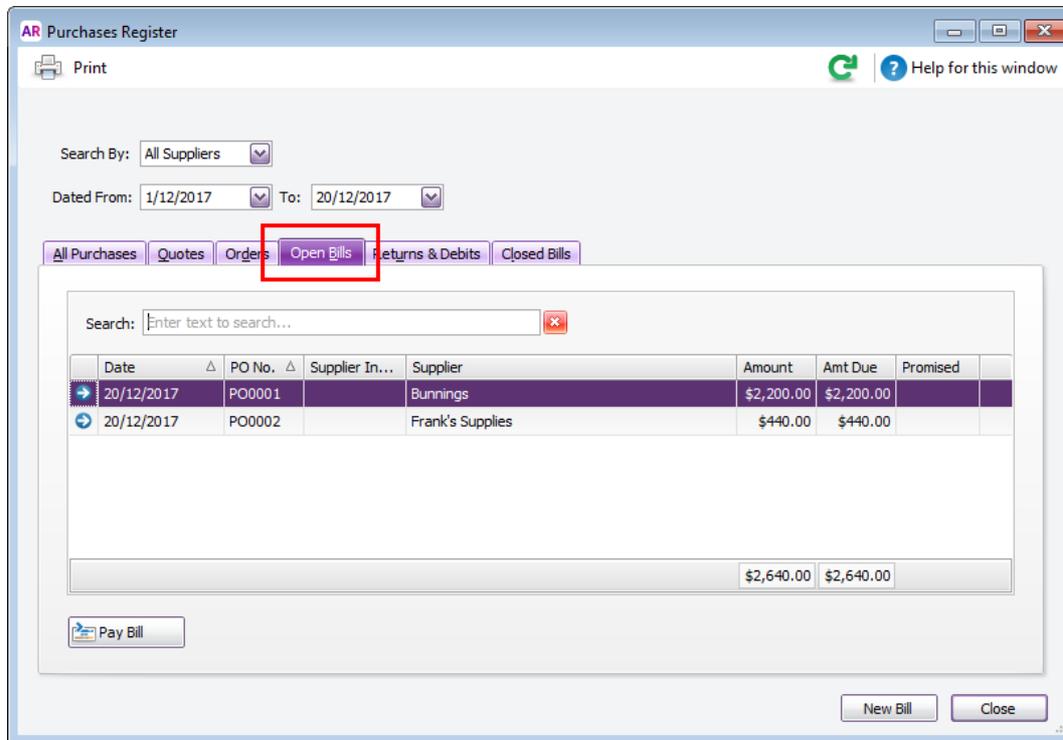
Head to Purchases > Purchases Register in MYOB.



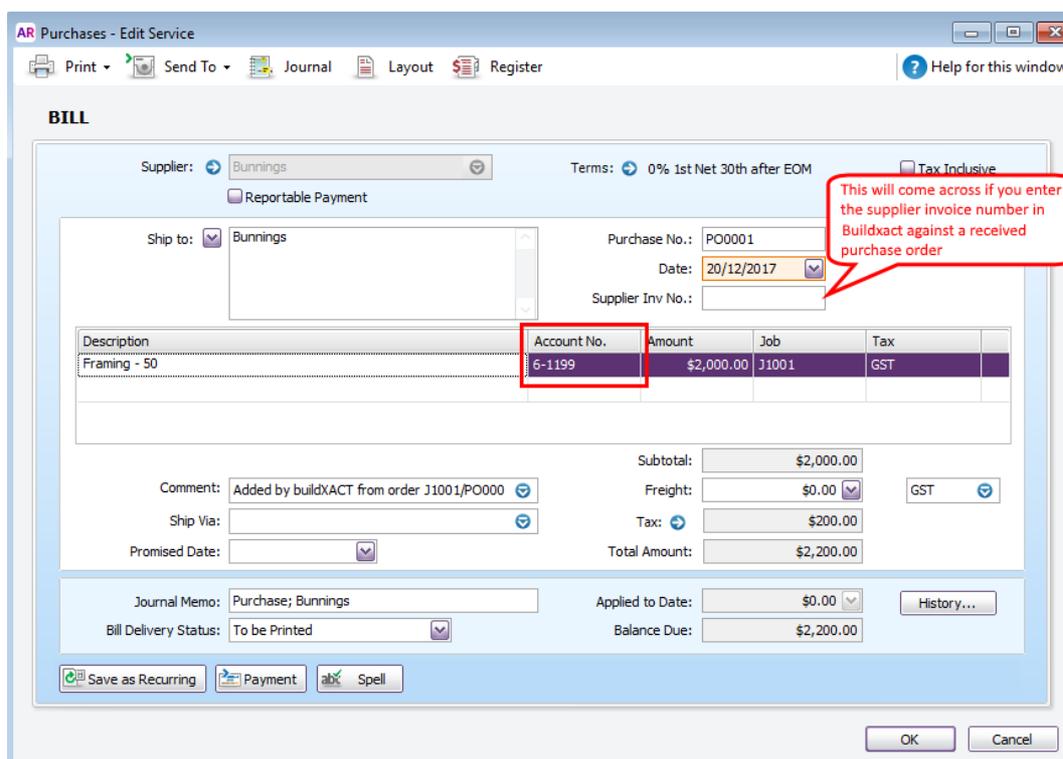
#### STEP 2

Purchasing information from Buildxact lands in the Open Bills section of MYOB.

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**STEP 3**  
Order PO0001 is now open.



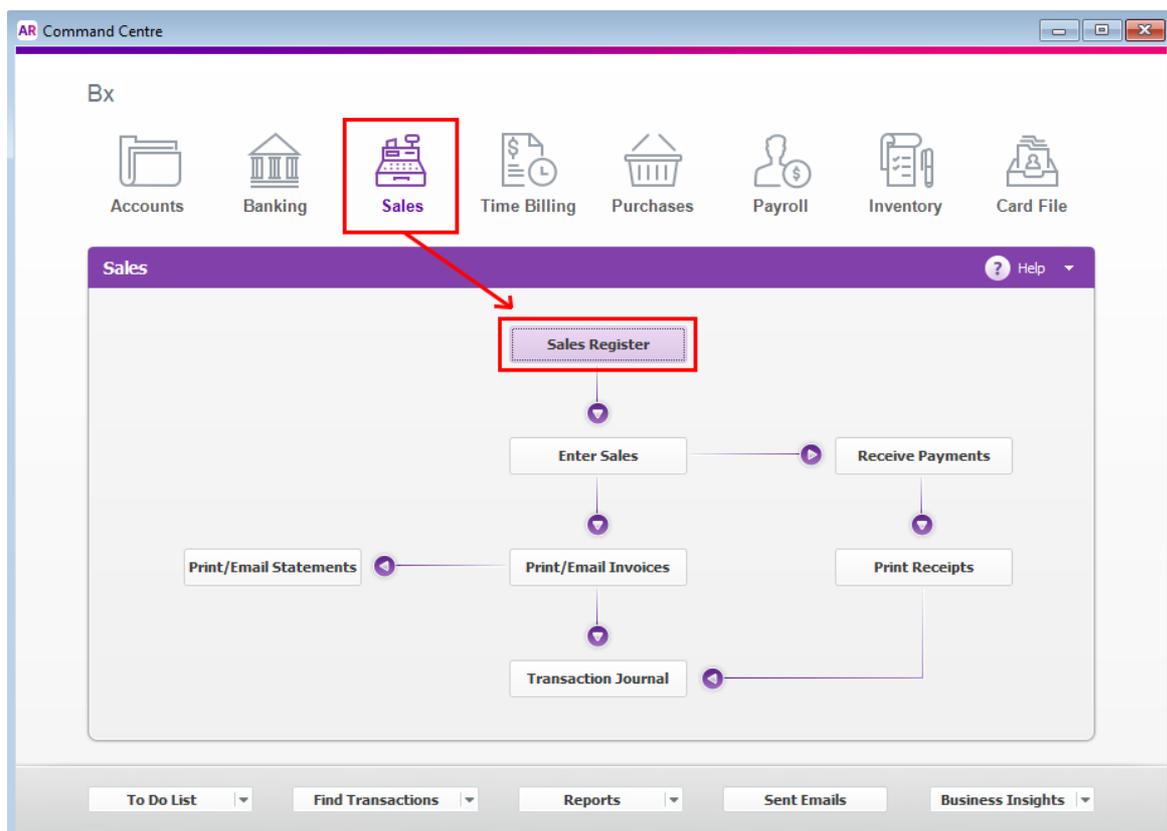
## Connecting Buildxact with MYOB

User Help Guide 2018

### Client invoice items

#### STEP 1

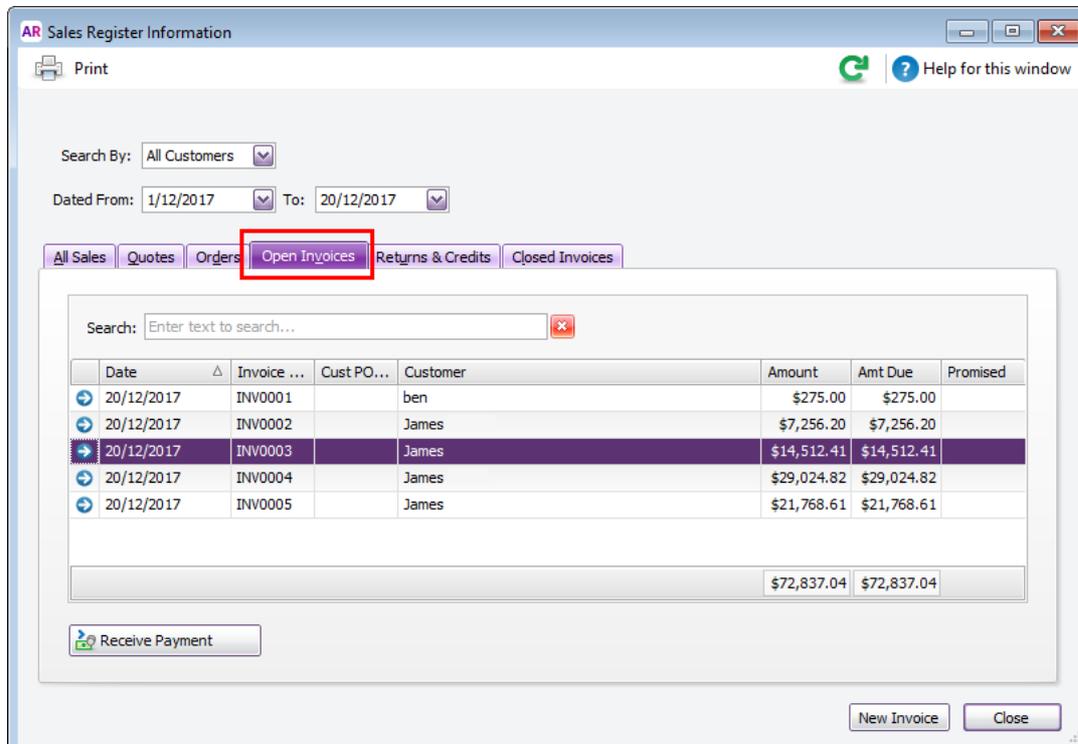
Head to Sales > Sales Register in MYOB.



#### STEP 2

Client invoice information from Buildxact lands in the Open Invoices section of MYOB.

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AR Sales Register Information

Print Help for this window

Search By: All Customers

Dated From: 1/12/2017 To: 20/12/2017

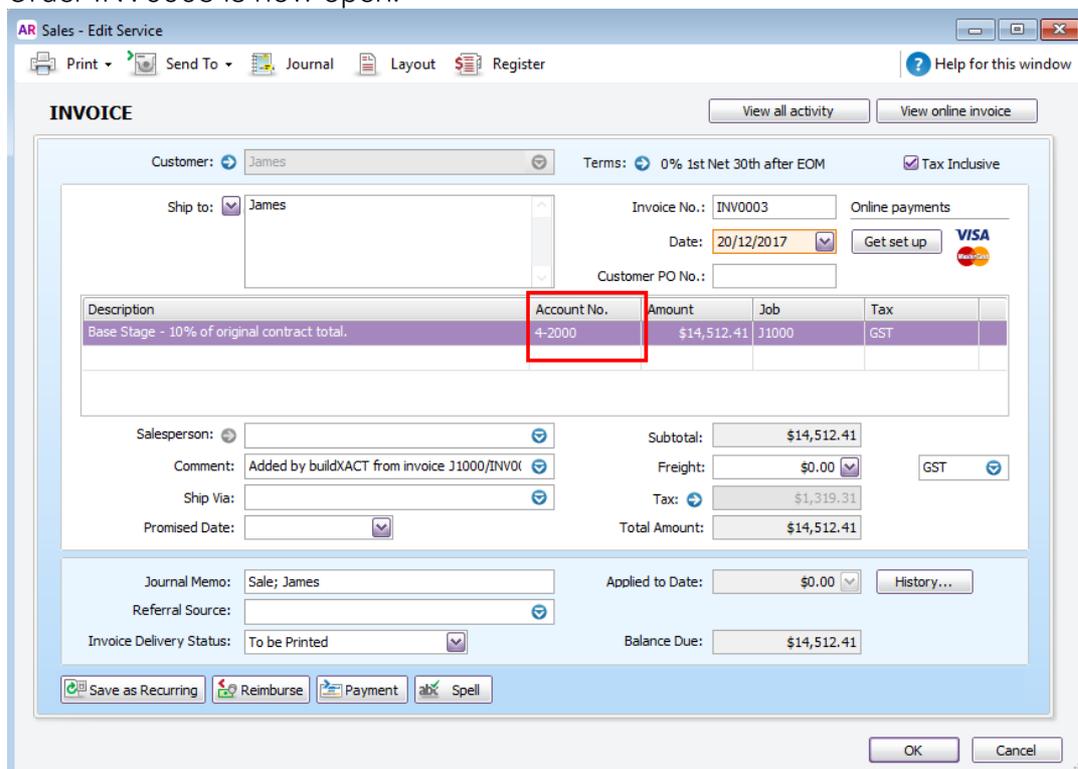
Search: Enter text to search...

Date	Invoice ...	Cust PO...	Customer	Amount	Amt Due	Promised
20/12/2017	INV0001		ben	\$275.00	\$275.00	
20/12/2017	INV0002		James	\$7,256.20	\$7,256.20	
20/12/2017	INV0003		James	\$14,512.41	\$14,512.41	
20/12/2017	INV0004		James	\$29,024.82	\$29,024.82	
20/12/2017	INV0005		James	\$21,768.61	\$21,768.61	
				\$72,837.04	\$72,837.04	

Receive Payment New Invoice Close

### STEP 3

Order INV0003 is now open.



AR Sales - Edit Service

Print Send To Journal Layout Register Help for this window

**INVOICE** View all activity View online invoice

Customer: James Terms: 0% 1st Net 30th after EOM  Tax Inclusive

Ship to: James Invoice No.: INV0003 Online payments

Date: 20/12/2017   

Customer PO No.:

Description	Account No.	Amount	Job	Tax
Base Stage - 10% of original contract total.	4-2000	\$14,512.41	J1000	GST

Salesperson: Subtotal: \$14,512.41

Comment: Added by buildXACT from invoice J1000/INVO... Freight: \$0.00

Ship Via: Tax: \$1,319.31

Promised Date: Total Amount: \$14,512.41

Journal Memo: Sale; James Applied to Date: \$0.00

Referral Source: Invoice Delivery Status: To be Printed Balance Due: \$14,512.41

OK Cancel

## Frequently asked questions (IMPORTANT)

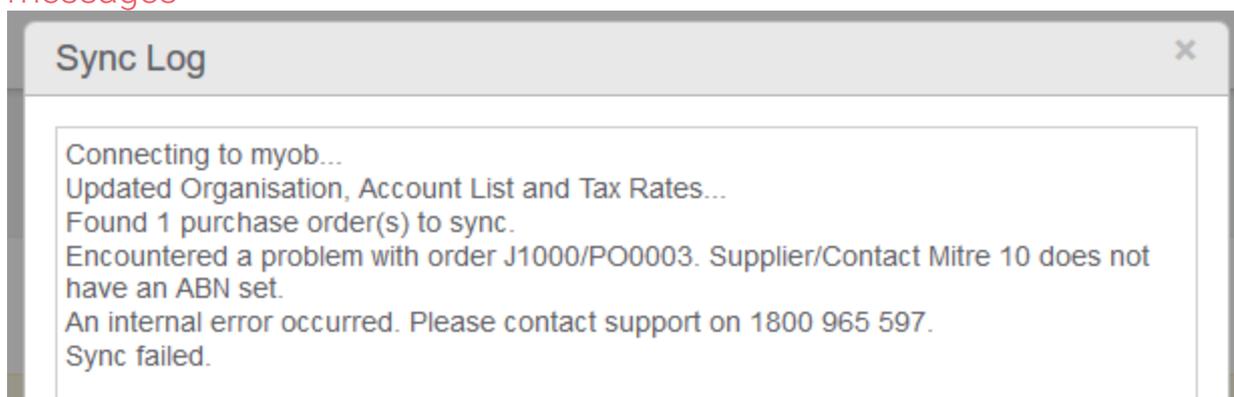
Q: If I update a purchase order in Buildxact once I have already synced it to my account does it re-sync?

A: If you sync an item (either purchasing or invoicing) and then change that item within Buildxact, the item **DOES NOT UPDATE** within your accounting, you will need to update it within your accounting software. This is the case because we don't know what has been done with the original sync data and re-sending it may lead to double ups.

Q: How Do I send different items from Buildxact to different accounts within MYOB?

A: Currently all items that go to accounting go first to the default account and then can be moved from there. So the trick is to have your purchase and client invoice information go to the most common account so that you have to move the least amount of items. This may update in the future.

Q: My syncs keep failing and I keep getting "does not have an ABN set" messages



A: This is a MYOB specific problem. Essentially MYOB doesn't handle well if Buildxact doesn't have an ABN for a supplier in the contractor information. Most likely is there is no ABN number, check this first. If the problem persists contact our Customer Support team on 1800 965 597.

## Further assistance

Please contact Buildxact on 1800 965 597.

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