



USER HELP GUIDE - 2018



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Introduction

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



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





BUILDXACT

Connecting Buildxact with MYOB

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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 <u>company file</u> (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 <u>administrator</u> with a blank password.

	Connecting to MYOB
	Select MYOB Company File
Company File: Username: Password:	administrator Cancel Continue

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 ??).





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ľ	MYOB Settings		Choose how far back
	Organisation:	Bx	purchases/invoices to sync
ł	Sync items from:	Wed, 20 Dec 2017	
	Sync 'Received' Purchase O	Irders	Select a default account for all your purchasing information to go to
Yc	Use a separate accour	t for Suppliers and Contr	ractors
	Expense Account:	6-1000 - Genera	l Expenses
		You can override thi	s account in each purchase order.
l	Expense Tax Type:	Goods & Service	s Tax
′C	Expense Tax-Free Type:	GST Free	Select a default account
Ŀ	Sync 'Invoiced' Job Invoices		information to go to
	Income Account:	4-2000 - Constru	iction Incom
	Income Tax Type:	Goods & Service	s Tax Check these boxes are correct (usually
l	Income Tax-Free Type:	GST Free	this will happen automatically)
Yc			
			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.



BUILDXACT

Connecting Buildxact with MYOB User Help Guide 2018

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.





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counts List				
New <u> </u> Edit 🗄	Print 🖬 Budgets			C Relp for this w
Accounts Asset Lia	bility Equity Income Cost Of Sales Exper	Other Income Oth	her Expense	<u> </u>
Search: Enter text t	o search	×	6-000 and 6-1000 are both just summary accounts, and	you
Account Number	Account Name	Туре	cannot send information to	them
6 0000	Evenencer	Evinence	\sim	
× 6 1000	Conoral Exponence	Expense		\$0.00
6-1000	Accounting/Bookeeping Fees	Expense	CST	\$0.00
6-1100	General Costs	Expense	NJT	\$0.00 \$0.00
6-1200	Advertising & Marketing	Sypense	GST	\$0.00
 5-1200 6-1300 	Bank Fees	pense	001	\$0.00
6-1400	Borrowing Expenses	You want one of	the accounts that	\$0.00
6-1500	Bad Debts	falls below the su	ummary account.	\$0.00
6-1600	Cleaning Expenses	I created this Ger	neral Cost account	\$0.00
6-1700	Electricity Expenses	information to	unoxact to send	\$0.00
6-1800	Gas Expenses	Expense	1991	\$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

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.

Search: Enter	text to search	4-0000 is just a sun and you cannot ser	nmary accoun nd information	t,	
Account Nu	mber Account Name	to it.		Linked	Balance
4-0000	Income	Income			\$0.00
🕥 🗸 4-1000	Service & Repair Income	Income	GST		\$0.00
🕤 🎻 4-2000	Construction Income	Income	GST	N	\$0.00
🕥 🗸 4-3000	Renovation Income	Income	GST		\$0.00
🕤 🏑 4-4000	Contract Variations	Income	GST	You want on	o of the accounts that 0.00
🕥 🧹 4-5000	Freight Income	Income	GST	falls below th	he summary account. 0.00
🕥 🏑 4-6000	Late Fees Collected	Income	GST	We're using	Construction here. 0.00
🕤 🗸 4-7000	Fuel Tax Credits	Income	N-T		0.00
8 /	ccounts				>





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	n ≑ Sup	oplier # 🛊	Supplier	Created -	Required \$	Total (Ex) 😄	Status \$
0001	Building Su	pplies		Bunnings	Dec 20, 2017	Jan 16, 2018	\$2,000.00	Received
Invoice # 🛊	Description \$	Invoiced -	Due ¢	Contract % 🖨	Contract (Ex) 4	Variations (Ex	x) ≑ 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







OPTION 2

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

MYOB	MYOB Online accounting software	
	i You are connect	ted to MYOB (Bx)
	Sync Now (2 items)	Settings

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

MYOB	MYOB Online accounting software	
	i You are connect	ted to MYOB (Bx)
	Sync Now (1 items)	
	Syncing(this ma	ay take up to 5 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.





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MYOB MYOB

Online accounting software
i You are connected to MYOB (Bx)
Nothing to sync Settings
✓ Last sync was successful 3 minutes ago

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

Sync Log				×
Connecting to myob Updated Organisation, Found 2 purchase orde Generated MYOB Bill fo Generated MYOB Bill fo Found 1 invoice(s) to s Generated MYOB Invoi Sync was successful.	Account List and T er(s) to sync. or Buildxact Order (or Buildxact Order (ync. ce for Buildxact Cla	ax Rates 0001 - Bunni 0002 - Frank aim/Invoice 0	ings for \$2,200.00 's Supplies for \$440 001 - ben for \$275.	0.00 00
Print log from:	20/11/17	to:	20/12/17	Print
				X Close





What does my info look like in MYOB?

Purchasing items

STEP 1

Head to Purchases > Purchases Register in MYOB.

AR Command	d Centre										• X
Bx	<										
	Accounts	Banking	Sales	[Tim	§ □ ■ ⊡ e Billing	Purchases		Payroll	Inventory	Card File	
P	Purchase	s				7				? Help 🔻	
				[Purchase	s Register					
		Pay Bills	0		Enter Pu	irchases	0-		In Tray		
		0									
		Prepare Electronic Payments			Print/Emai	l Purchase			Report Taxabl	e	
		Print Cheques			Ord	ers			Payments		
		0)					
		Print/Email Remittance Advices		0	Transactio	on Journal					
	To Do Li	st 💌 Find Tra	ansactions	Ŧ	Repo	erts 🔻		Sent Emails	Busi	ness Insights 💌	

STEP 2

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





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Purchases Register					
1 Print				C' ?+	lelp for this windo
Search By: All Suppliers	s 🔽				
Dated From: 1/12/2017	To: 20/12/2017	7 🔊			
All Purchases Quotes	Orders Open Bills F.e	turns & Debits Closed Bills			
Search: Enter text	to search	×			
Date 🛆	PO No. 🛆 Supplier In	. Supplier	Amount	Amt Due Pro	omised
20/12/2017	PO0001	Bunnings	\$2,200.00	\$2,200.00	
20/12/2017	PO0002	Frank's Supplies	\$440.00	\$440.00	
			¢2 640 00	¢2,640,00	
			\$2,040.00	\$2,040.00	
Pay Bill					
				Now Pill	Class
				INEW DIII	Close

STEP 3

Order PO0001 is now open.

R Purchases - Edit Service					
🖶 Print 🗸 📷 Send To	🗸 🔜 Journal 🗎 Layo	out 🗐 Register			Pelp for this windo
BILL					
Supplier: 🧲	Bunnings	0	Terms: 文 0% 1st I	Net 30th after EOM	Tax Inclusive This will come across if you ente the supplier invoice number in
Ship to:	Bunnings	^	Purchase No.:	PO0001	Buildxact against a received purchase order
			Date:	20/12/2017	
		~	Supplier Inv No.:		
Description		Ad	count No. Amount	Job	Tax
Framing - 50		6-	1199 \$:	2,000.00 J1001	GST
Comment	t: Added by buildXACT from order	. 11001/PO000 ; €	Subtotal: Freight:	\$2,000.	
Ship Via		0	Tax: 🌑	\$200.	00
Promised Date			Total Amount:	\$2,200.	00
Journal Memo	Purchase; Bunnings		Applied to Date:	\$0.00	History
Bill Delivery Status	To be Printed		Balance Due:	\$2,200.	00
Save as Recurring	Payment and Spell				
					OK Cancel





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Client invoice items

STEP 1

Head to Sales > Sales Register in MYOB.

AR Command Centre		
Bx Accounts Banking Sales	S Time Billing Purchases Payroll	Inventory Card File
SaleS	Sales Register	Receive Payments
Print/Email Statements	Print/Email Invoices	Print Receipts
To Do List 💌 Find Transactions 💌	Reports 💌 Sent Emai	ils Business Insights 💌

STEP 2

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





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	nt				G	2 🕜 He	lp for this wind
Searc	h By: All Customer						
ated	From: 1/12/2017	M To:	20/12/2017				
l Sale	s <u>Q</u> uotes Or <u>d</u> e	rs Open In	n <u>v</u> oices Ret	turns & Credits Closed Invoices			
Se	earch: Enter text to	search		×			
_							
	Date 🛆	Invoice	Cust PO	Customer Amo	ount	Amt Due	Promised
Ð	20/12/2017	INV0001		ben	\$275.00	\$275.00	
-	20/12/2017	INV0002		James \$7	7,256.20	\$7,256.20	
٢				13mon (\$14	4 517 41	\$14,512,41	
○	20/12/2017	INV0003		James \$17	1,512.11	Q1 (J012) 11	
	20/12/2017 20/12/2017	INV0003 INV0004		James \$29	9,024.82	\$29,024.82	
 • •<	20/12/2017 20/12/2017 20/12/2017	INV0003 INV0004 INV0005		James \$29 James \$22	9,024.82 1,768.61	\$29,024.82 \$21,768.61	
9 9 9	20/12/2017 20/12/2017 20/12/2017	INV0003 INV0004 INV0005		James \$29 James \$21	9,024.82 1,768.61	\$29,024.82 \$21,768.61	
 Э Э Э 	20/12/2017 20/12/2017 20/12/2017	INV0003 INV0004 INV0005		James \$29 James \$29	9,024.82 1,768.61	\$29,024.82 \$21,768.61	
 ? ? ? ? 	20/12/2017 20/12/2017 20/12/2017	INV0003 INV0004 INV0005		James \$29 James \$29	9,022.41 9,024.82 1,768.61 2,837.04	\$29,024.82 \$21,768.61 \$72,837.04	
	20/12/2017 20/12/2017 20/12/2017	INV0003 INV0004 INV0005		James \$29 James \$29	9,024.82 1,768.61 2,837.04	\$29,024.82 \$21,768.61 \$72,837.04	
	20/12/2017 20/12/2017 20/12/2017 Receive Payment	INV0003 INV0004 INV0005		James \$29 James \$29	9,024.82 1,768.61 2,837.04	\$29,024.82 \$21,768.61 \$72,837.04	

STEP 3

Order INV0003 is now open.

AR Sales - Edit Service									
📄 Print 🗸 💽 Send To 🗸	🔜 Journal 🖺 Layout 🗐 Regis	ster						7 Help f	or this window
INVOICE					Vi	ew all activity		iew online i	nvoice
Customer: 🕥	James	Θ	Terms: 🌖	0% 1st	Net 30t	h after EOM	6	🖉 Tax Indu	isive
Ship to: 💌	James	\sim	Inv	voice No.:	INV00	03	Online pa	yments	
				Date:	20/12	/2017 🕑	Get set	up VI	5A
		\sim	Custome	r PO No.:				New York	~
Description		Accou	unt No.	Amount		Job	Tax		
Base Stage - 10% of orig	inal contract total.	4-200	0	\$14,	512.41	J1000	GST		
Salesperson: 🕥		Θ		Subtotal:		\$14,512.4	1		
Comment:	Added by buildXACT from invoice J1000/INV0(ً		Freight:		\$0.00	~	GST	Θ
Ship Via:		ً		Tax: 🕤		\$1,319.3	1		
Promised Date:			Tota	Amount:		\$14,512.4	1		
Journal Memo:	Sale; James		Applied	to Date:		\$0.00	П	story	
Referral Source:		⋳							
Invoice Delivery Status:	To be Printed		Bala	nce Due:		\$14,512.4	11		
Cell Save as Recurring	Reimburse Payment as Spel								
							(ж	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 <u>DOES NOT UPDATE</u> 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

Sync Log Connecting to myob... Updated Organisation, Account List and Tax Rates... Found 1 purchase order(s) to sync. Encountered a problem with order J1000/PO0003. Supplier/Contact Mitre 10 does not have an ABN set. An internal error occurred. Please contact support on 1800 965 597. Sync failed.

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.