



**BUILDXACT**

## **Connecting Buildxact with MYOB**



USER HELP GUIDE - 2020



## CONTENTS

Introduction .....	3
Summary of the whole sync process .....	3
Connecting.....	4
Initial Connection.....	4
General settings .....	5
Help selecting the right MYOB accounts .....	7
How does MYOB know which account to use? .....	9
Syncing with MYOB .....	10
How to sync .....	10
What the data looks like in MYOB .....	12
Supplier and Contractor Purchase Orders .....	12
Client invoices.....	12
Frequently Asked Questions (IMPORTANT).....	13
Resyncing to MYOB.....	13
Fixing mistakes.....	13
Sorting of contacts .....	14
General business overheads.....	14
My syncs keep failing and I keep getting “does not have an ABN set” messages.....	14
Further assistance.....	14

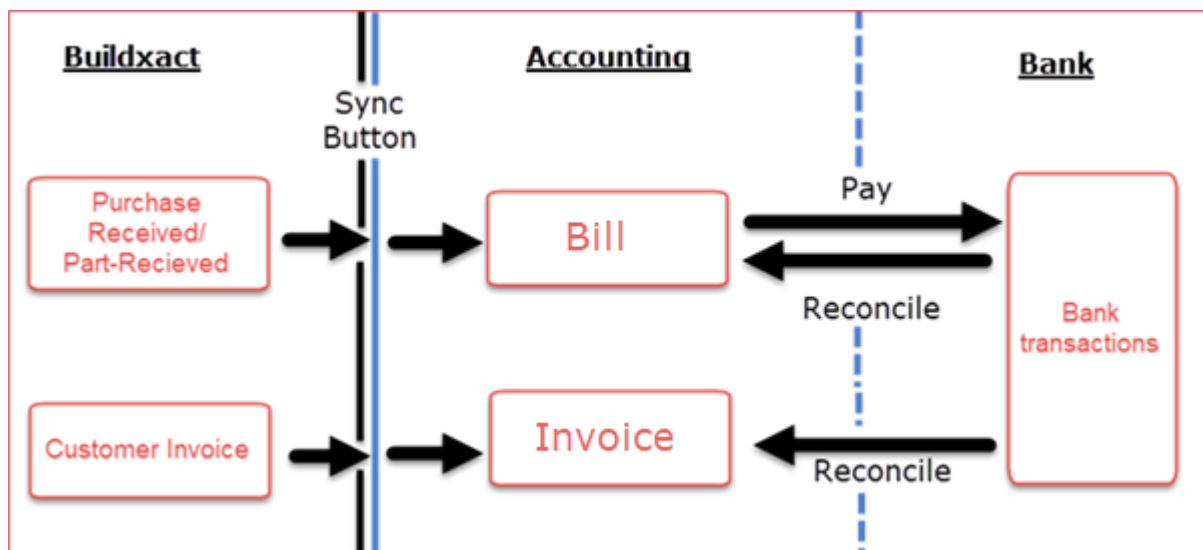
## Introduction

This document will guide you through the initial connection with MYOB Account Right Live (referred to as "MYOB") as well as detail how the connection works so that you can get as much as possible from integrating these two software systems.

## Summary of the whole sync process

Below is a summary of the whole integration with MYOB, we have included the bank in this as MYOB connects with your bank for easy reconciling and payment of items.

In summary, users enter purchase and customer invoice information into Buildxact so that we can use that for effective tracking and reporting. To avoid users having to then enter that same information again into MYOB, we push the information across into your MYOB account when you prompt Buildxact to sync.

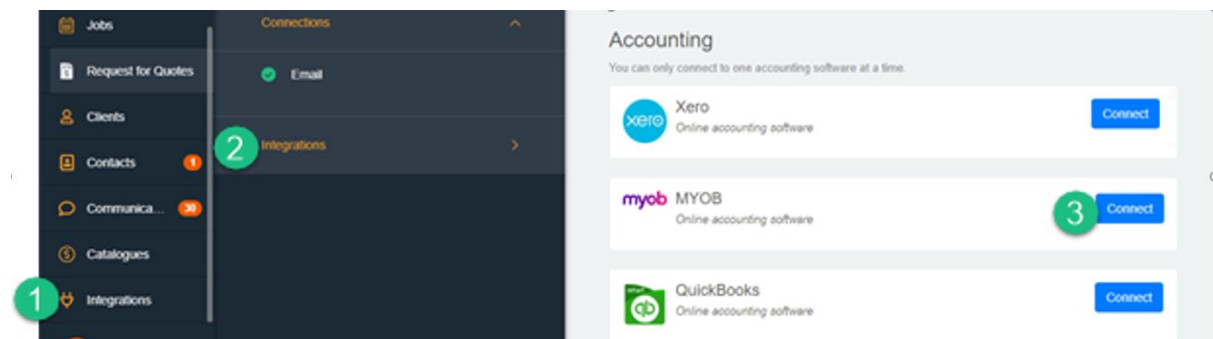


## Connecting

This will take you through the initial connection and getting the settings right.

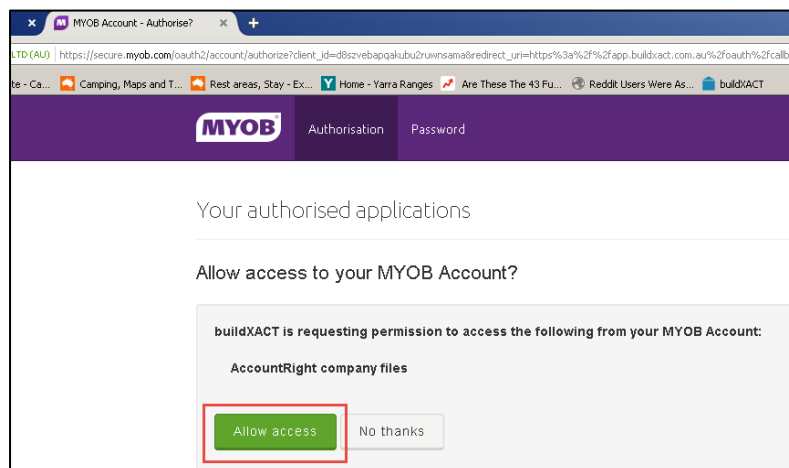
### Initial Connection

1. In the Buildxact Navigation menu, click "Integrations"
2. Click "Integrations" in the sub menu
3. Click "Connect" beside MYOB



When the MYOB log in page opens, enter your log in details. If you are currently logged into MYOB this step will skip.

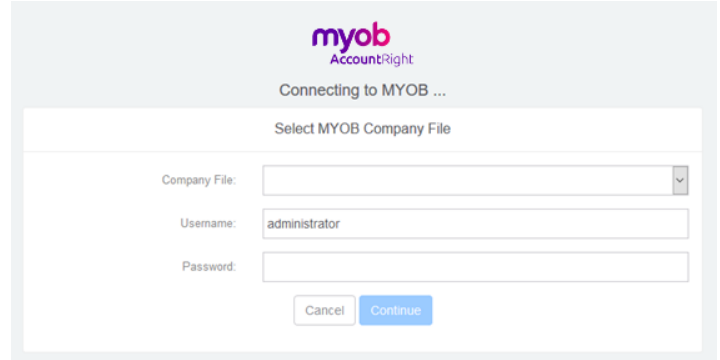
4. In the pop up, click "Allow Access"



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

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.



## General settings

1. You have the option to sync information relating to purchases made (Received Purchase Orders) and/or customer invoices (Invoiced Job Invoices). This option simply selects if you want to sync one or both into MYOB.
2. The sync item date indicates how far back Buildxact will look for items to sync. It can be useful as a "line in the sand" when changing from another program. This date will use the "Received Date" on purchase orders and the "Invoiced Date" on customer invoices to work out whether an item should sync.

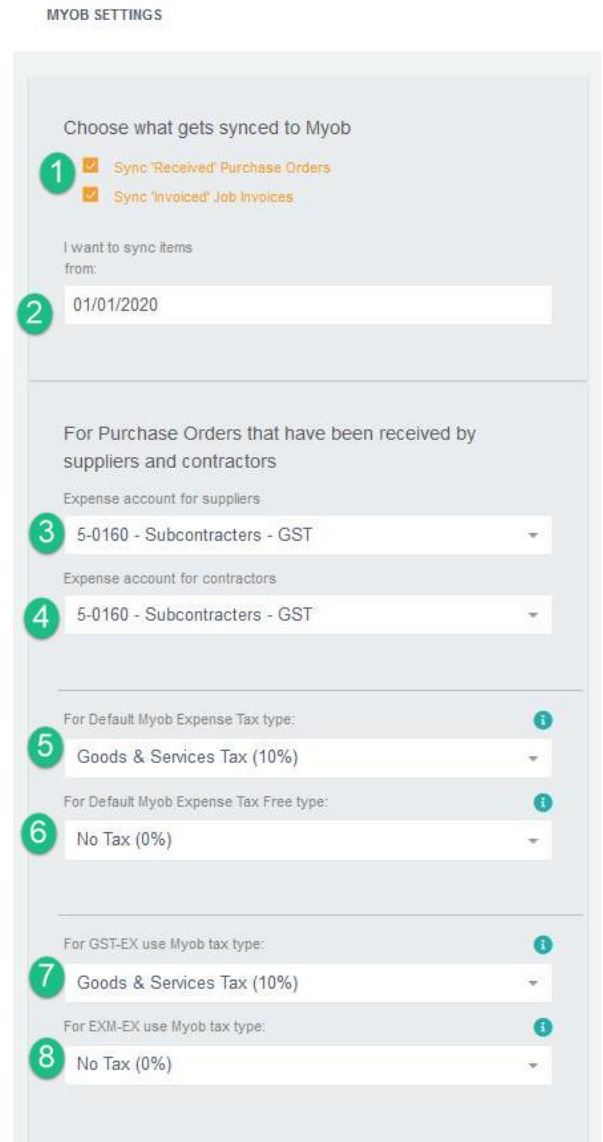
## "To" accounts - Expenses

*You can further customise where we send things in MYOB via the "How does MYOB know which account to use?" section in this document.*

3. This is the default account for all purchases made where the contact used on that order is set as a "Supplier" in your contacts section.
4. This is the default account for all purchases made where the contact used is set as a Contractor in your contacts section.

## Expense Tax types for our old tax settings

Old tax settings relate to jobs linked to estimates created prior to Nov/2020





5. This will generally be pre-set. For purchases where there is tax being added, we need to tell MYOB which tax type to use.
6. This will generally be pre-set. For purchases where there is no tax being added, we need to tell MYOB which tax type to use.

### Expense Tax types for our new tax settings

*New tax settings relate to jobs linked to estimates created after Nov/2020*

7. This will generally be pre-set. For purchases where there is tax being added, we need to tell MYOB which tax type to use.
8. This will generally be pre-set. For purchases where there is no tax being added, we need to tell MYOB which tax type to use.

### "To" account - Income

9. This is the account in MYOB where we will send all customer invoices

### Income Tax types for our old tax settings

*Old tax settings relate to jobs linked to estimates created prior to Nov/2020*

10. This will generally be pre-set. For invoices where there is tax being added, we need to tell MYOB which tax type to use.
11. This will generally be pre-set. For invoices where there is no tax being added, we need to tell MYOB which tax type to use.

### Expense Tax types for our new tax settings

*New tax settings relate to jobs linked to estimates created after Nov/2020*

12. This will generally be pre-set. For invoices where there is tax being added, we need to tell MYOB which tax type to use.
13. This will generally be pre-set. For invoices where there is no tax being added, we need to tell MYOB which tax type to use.

All done. Click Save Settings and Close.

For job invoices that have been invoiced to clients

Use Myob income account

9 4-3000 - General Payment

For Default Myob Income Tax type: i

10 Goods & Services Tax (10%)

For Default Myob Income Tax Free type: i

11 No Tax (0%)

For GST-IN use Myob tax type: i

12 Goods & Services Tax (10%)

For EXM-IN use Myob tax type: i

13 No Tax (0%)

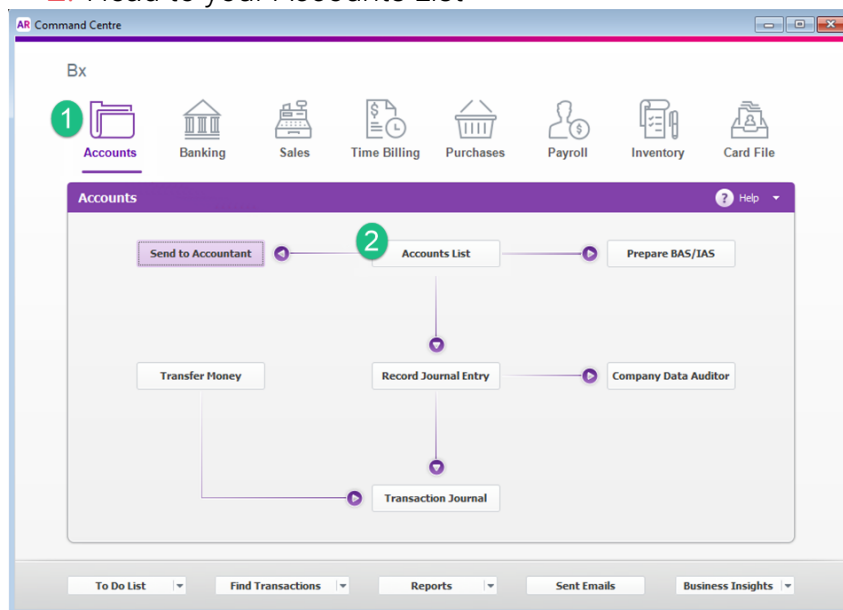
Cancel Save Settings and Close

## Help selecting the right MYOB accounts

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

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

1. Click on Accounts
2. Head to your Accounts List



### Expense account (purchasing)

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

3. Click on the Expense tab
4. 6-000 and 6-100 are both just summary accounts and hence you cannot send information to them
5. The accounts you want to use will fall below the summary account. In this example we created a "General Cost" account specifically for Buildxact

## Connecting Buildxact with MYOB

User Help Guide 2020



BUILDxACT

AR Accounts List

New Edit Print Budgets

3

All Accounts Asset Liability Equity Income Cost Of Sales Expense Other Income Other Expense

Search: Enter text to search...

Account Number	Account Name	Type				
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	Expense	GST			\$0.00
6-1400	Borrowing Expenses	Expense	GST			\$0.00
6-1500	Bad Debts	Expense	GST			\$0.00
6-1600	Cleaning Expenses	Expense	GST			\$0.00
6-1700	Electricity Expenses	Expense	GST			\$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

4

5

### Revenue account (client invoicing)

6. Click on the Income tab
7. 4-000 is just a summary account and hence you cannot send information to them
8. The accounts you want to use will fall below the summary account. In this example we're using Construction Income

AR Accounts List

New Edit Print Budgets

6

All Accounts Asset Liability Equity Income Cost Of Sales Expense Other Income Other Expense

Search: Enter text to search...

Account Number	Account Name		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

7

8

8 Accounts

Up Down Combine Accounts

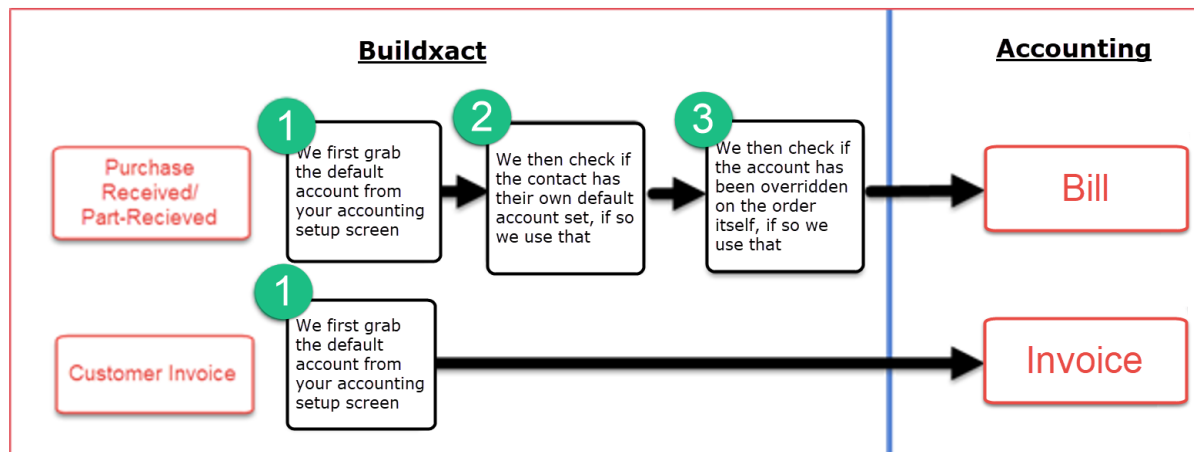
Close



## How does MYOB know which account to use?

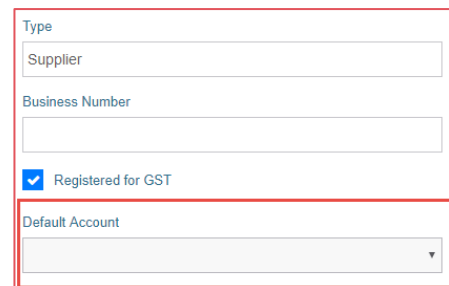
When we send a purchase or invoice to MYOB, we also send the “to” account which controls which account in MYOB the item lands in. This is quite a flexible process meaning you can change the account an item will go to within MYOB at several points.

See the process below, the red numbers indicate each possible place the account can be set/altered before.



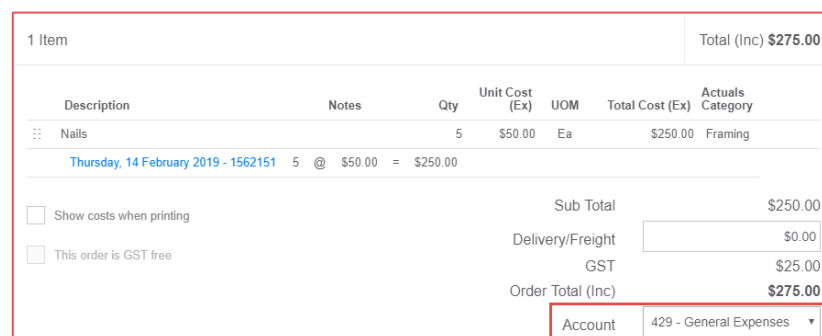
### Setting a default account on a contact

If you want to change the default account for a contact, head to the contact itself and there is an area where you can set this. This is good if every time you use a supplier they need to go to an account **different to the main default account**.



### Changing the account on the order itself

Changing the account on the order itself is good for exceptions, or when you want to change the account at the last second.



Description	Notes	Qty	Unit Cost (Ex)	UOM	Total Cost (Ex)	Actuals Category
Nails		5	\$50.00	Ea	\$250.00	Framing
Thursday, 14 February 2019 - 1562151 5 @ \$50.00 = \$250.00						
<input type="checkbox"/> Show costs when printing <input type="checkbox"/> This order is GST free						Sub Total \$250.00 Delivery/Freight \$0.00 GST \$25.00 <b>Order Total (Inc) \$275.00</b>
Account						429 - General Expenses

## Syncing with MYOB

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

Buildxact will want to send data (sync) to MYOB when there are

1. Purchase Orders marked "Part Received"
2. Purchase Orders marked as "Received"

All Orders - 55

AllUnsentSentPart ReceivedReceivedCancelledCompleted

Order #	Description	Job	Supplier #	Supplier/Assigned	Created	Required	Total (Ex)	Status
0048		J1098 - Renovation	234	Bunnings	18 Feb 2020		\$167.39	1Part Received
0047		J1098 - Renovation	34567	Brickin It Bricklaying	18 Feb 2020		\$1,007.18	2Received

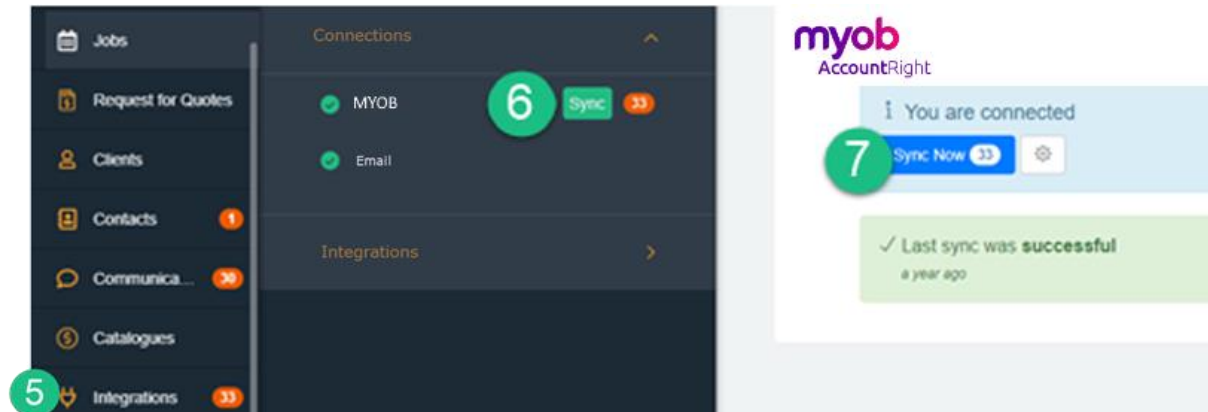
3. Customer invoices marked as "Invoiced"
4. Customer invoices marked as "Received"

Invoices - 113

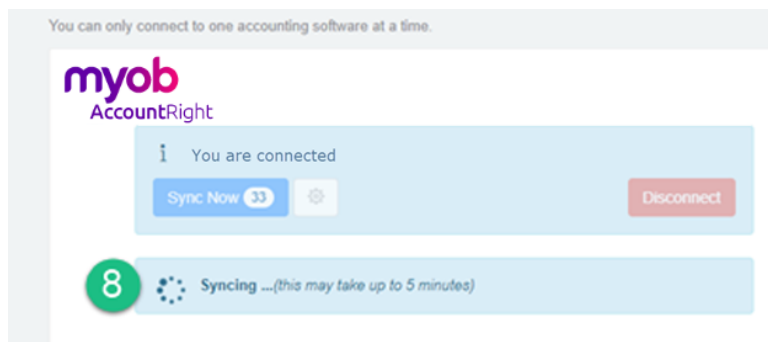
<a href="#">All</a> <a href="#">Pending</a> <a href="#">Invoiced</a> <a href="#">Part Received</a> <a href="#">Received</a>							
Invoice #	Description	Job	Job Customer	Invoiced	Due	Total (Inc)	Status
0036	claim 1	J1097 - Renovation	John Smith	6 Feb 2020	20 Feb 2020	\$3,182.91	3 <a href="#">Invoiced</a>
0035	Refundable Deposit	J1102 - Renovation	John Smith	4 Feb 2020	18 Feb 2020	\$939.76	4 <a href="#">Received</a>

### How to sync

5. The "Integrations" tab will have the number of items to sync
6. Click the green "Sync" button  
OR
7. Click the blue "Sync now" button on the integrations screen

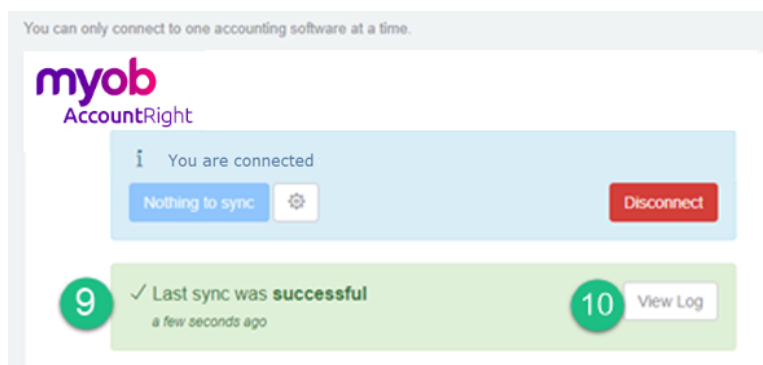


9. A message appears, as the sync occurs



10. Once sync is completed a message appears notifying the last successful sync

11. Click "View Log" if you want to see a list of the sync history

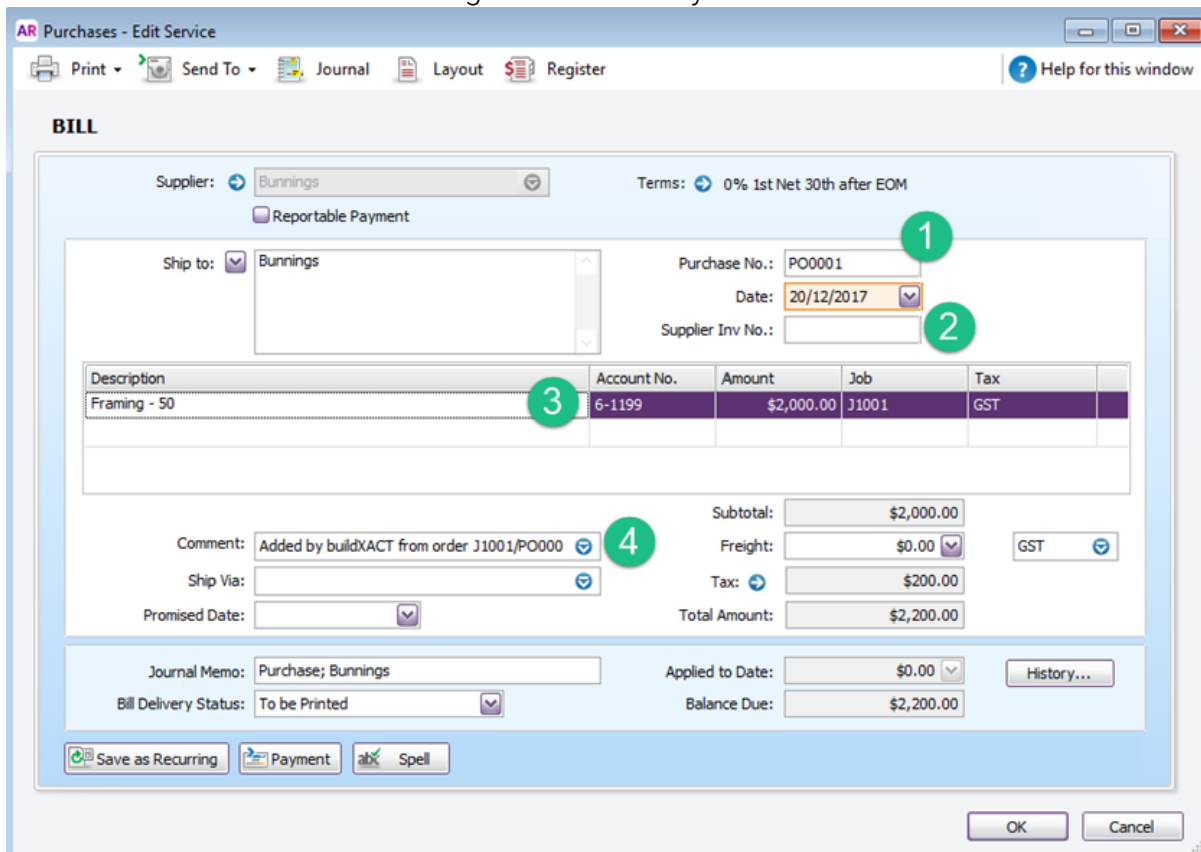


## What the data looks like in MYOB

### Supplier and Contractor Purchase Orders

Purchases will be created in MYOB as a Bill within the Open Bills section

1. The purchase number will come through from Buildxact
2. If you add a receipt/invoice number in Buildxact it will add here
3. We bring across the item detail and assign the account within MYOB
4. A note will be left confirming that the item synced in from Buildxact



**AR Purchases - Edit Service**

Print Send To Journal Layout Register Help for this window

**BILL**

Supplier: Bunnings Terms: 0% 1st Net 30th after EOM

Reportable Payment

Ship to: Bunnings Purchase No.: PO0001 Date: 20/12/2017 Supplier Inv No.:

Description	Account No.	Amount	Job	Tax
Framing - 50	6-1199	\$2,000.00	J1001	GST

Subtotal: \$2,000.00 Freight: \$0.00 Tax: \$200.00 Total Amount: \$2,200.00

Comment: Added by buildXACT from order J1001/PO000 Ship Via: Promised Date:

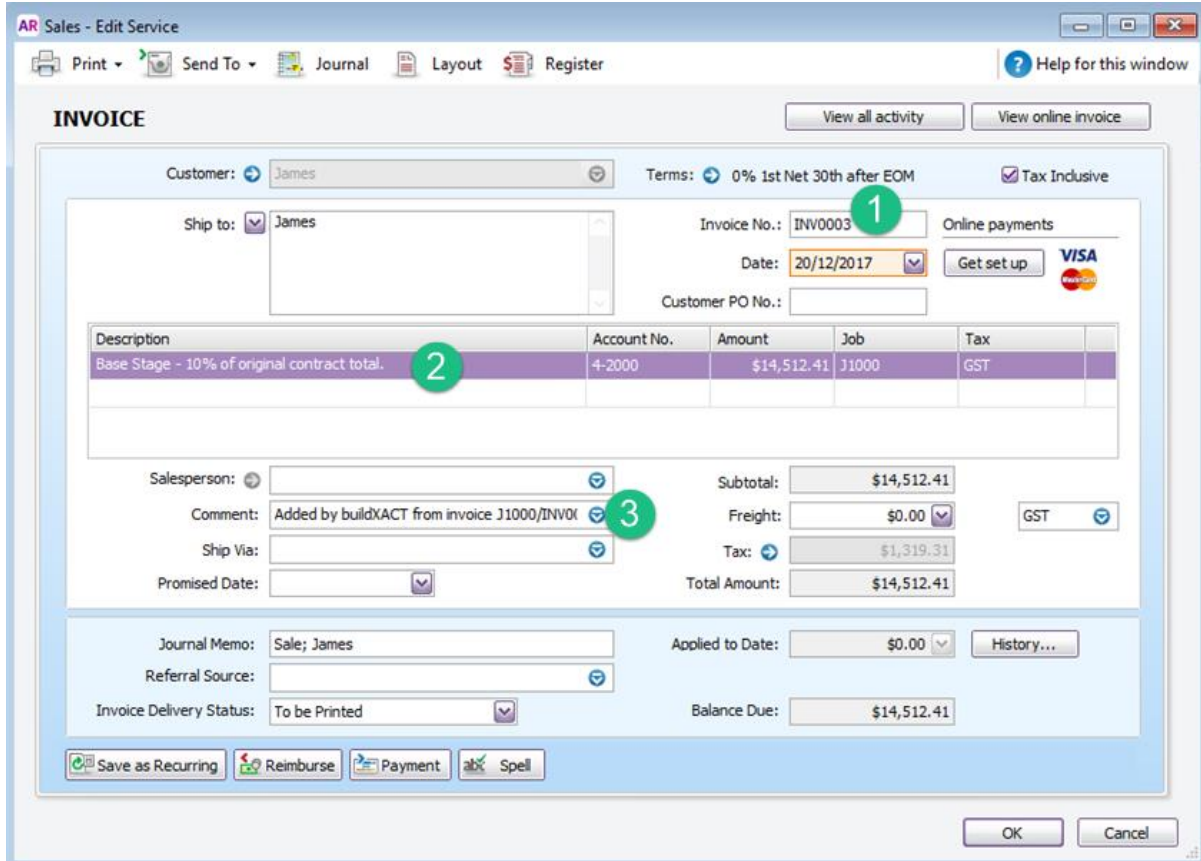
Journal Memo: Purchase; Bunnings Bill Delivery Status: To be Printed Applied to Date: \$0.00 Balance Due: \$2,200.00

Save as Recurring Payment Spell OK Cancel

### Client invoices

A client invoice within Buildxact will become an Invoice within MYOB and appear in the Open Invoices section

1. The invoice number will come through from Buildxact
2. We bring across the item detail and assign the account within MYOB
3. A note will be left confirming that the item synced in from Buildxact



**INVOICE**

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

Ship to: James Invoice No.: INV0003 Date: 20/12/2017 Online payments Get set up VISA

Customer PO No.:

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

Salesperson: Comment: Added by buildXACT from invoice J1000/INVO Ship Via: Promised Date:

Subtotal: \$14,512.41 Freight: \$0.00 GST Tax: \$1,319.31 Total Amount: \$14,512.41

Journal Memo: Sale; James Applied to Date: \$0.00 History... Referral Source: Invoice Delivery Status: To be Printed Balance Due: \$14,512.41

Save as Recurring Reimburse Payment Spell OK Cancel

## Frequently Asked Questions (IMPORTANT)

### Resyncing to MYOB

If you sync an item to MYOB, and then make subsequent changes to that item within Buildxact, the item **DOES NOT UPDATE** within MYOB. The item will need to be manually updated in MYOB as well. Once an item has been sent across, it will not send again, even after changes, as re-sending may lead to duplicates.

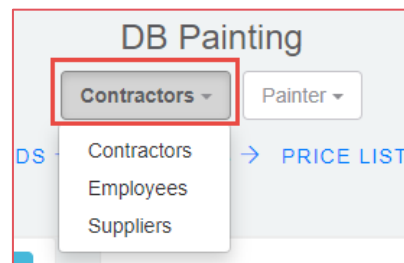
### Fixing mistakes

Since items only sync once from Buildxact to MYOB, mistakes will need to be fixed in both MYOB and Buildxact.



### Sorting of contacts

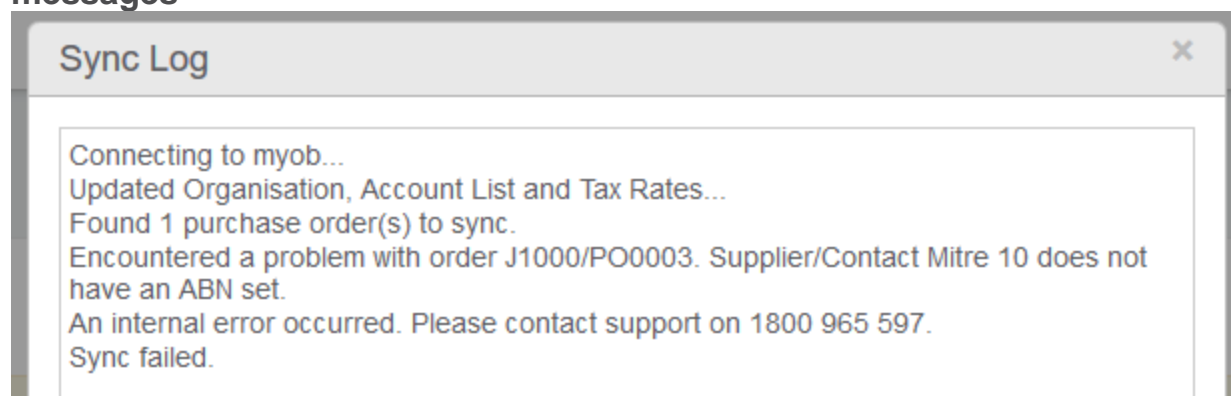
If you want Buildxact to send items to a Supplier Expense account and a Contractor Expense account in MYOB, then we must know which of your contacts are Suppliers and which are Contractors. Please be doubly sure to have this set right for all your contacts as shown.



### General business overheads

As Buildxact is very job focused we often get the question of where overheads such as phone bills/car lease/office lease are best entered. In our opinion these are best to enter directly into MYOB as they are very difficult to fit into any one job.

### My syncs keep failing and I keep getting “does not have an ABN set” messages



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 in app under the Explore section in the left-hand navigation menu.



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