BUILDXACT

Connecting Buildxact with MYOB

myob AccountRight

USER HELP GUIDE - 2020

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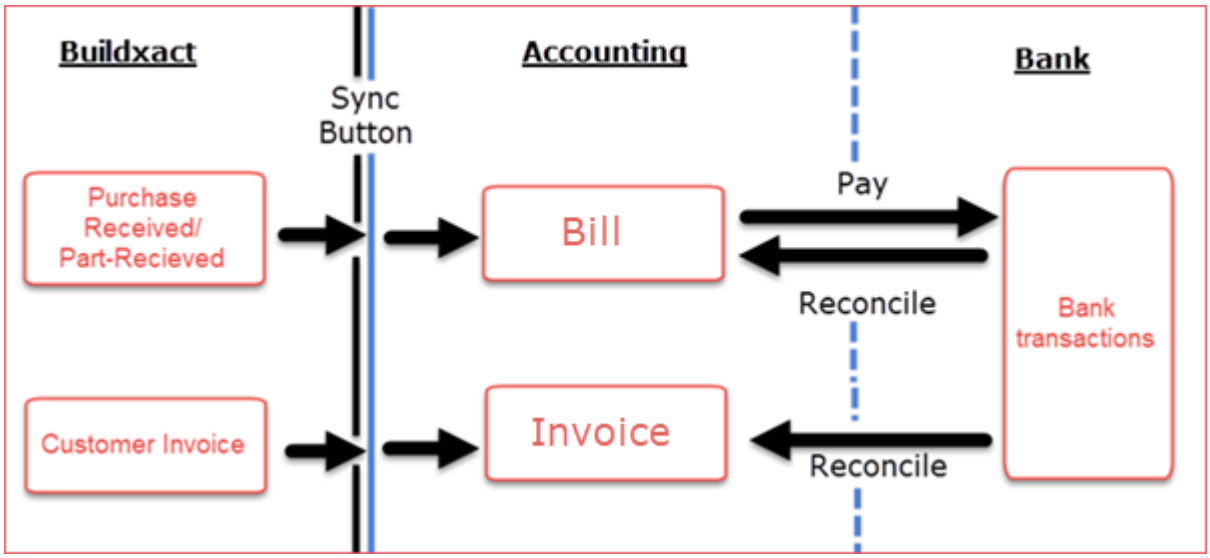
Introduction

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.

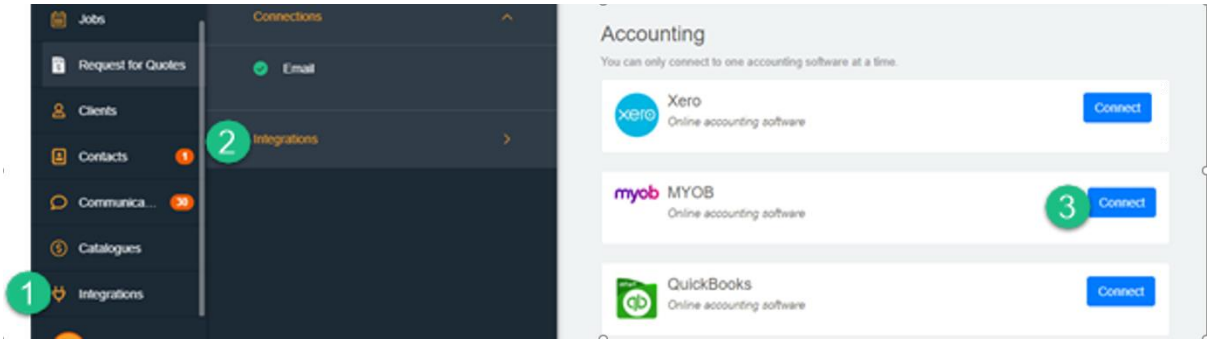


Connecting

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

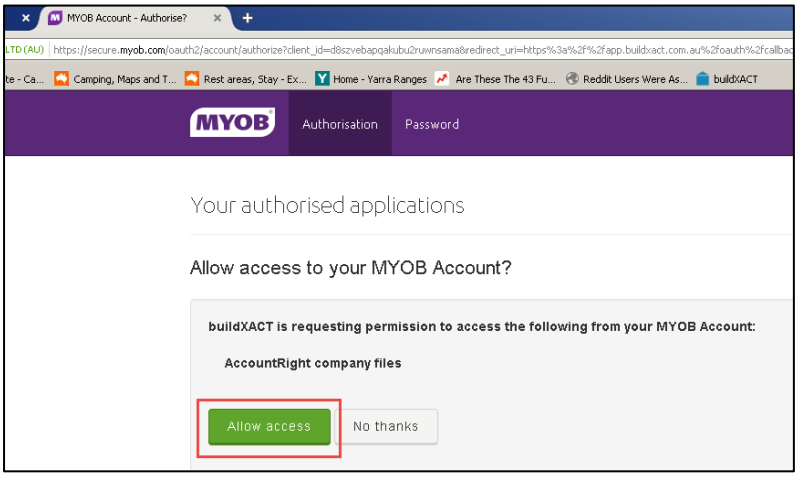
Initial Connection

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.

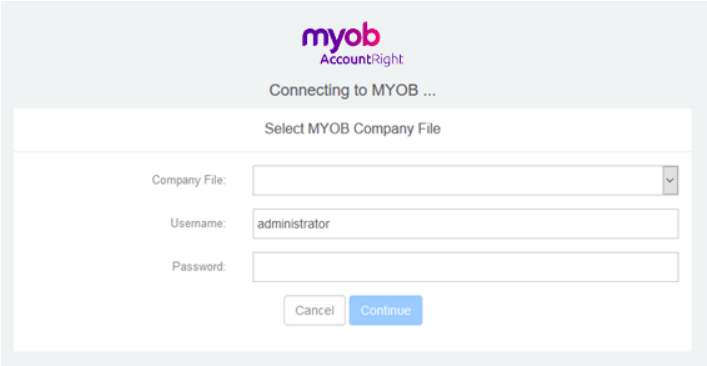
4. In the pop up, click “Allow Access”



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

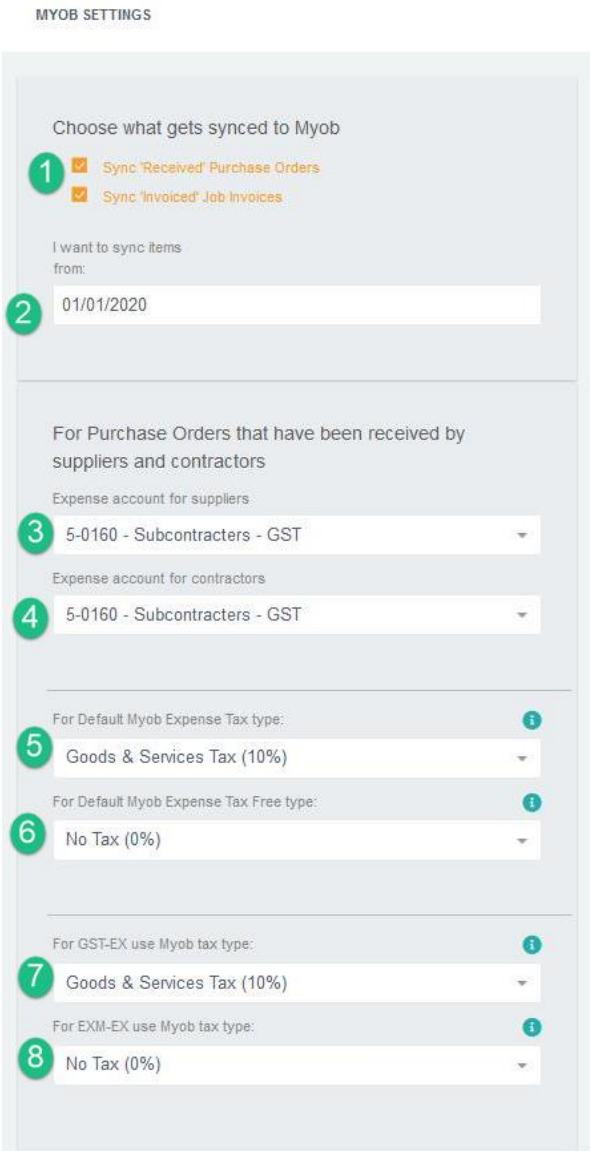
6. Then you'll need to enter the details for your company file (ie: this is not your login to MYOB itself but the login to the file for that company).

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.

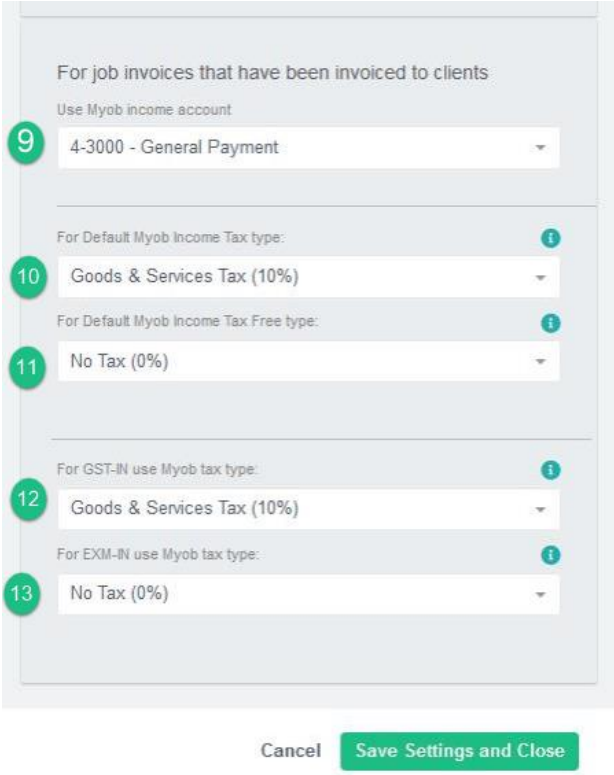
"To" account - Income

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.

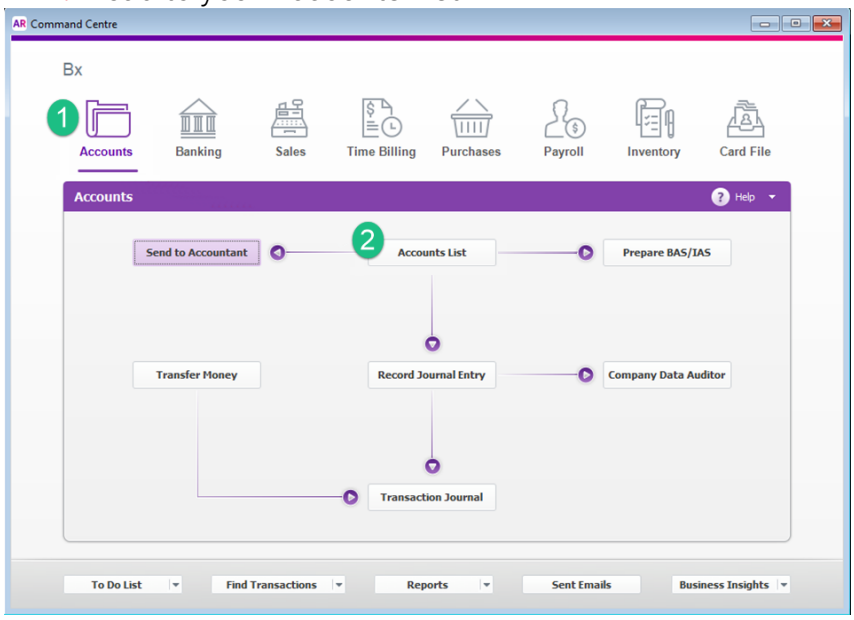
All done. Click Save Settings and Close.

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.

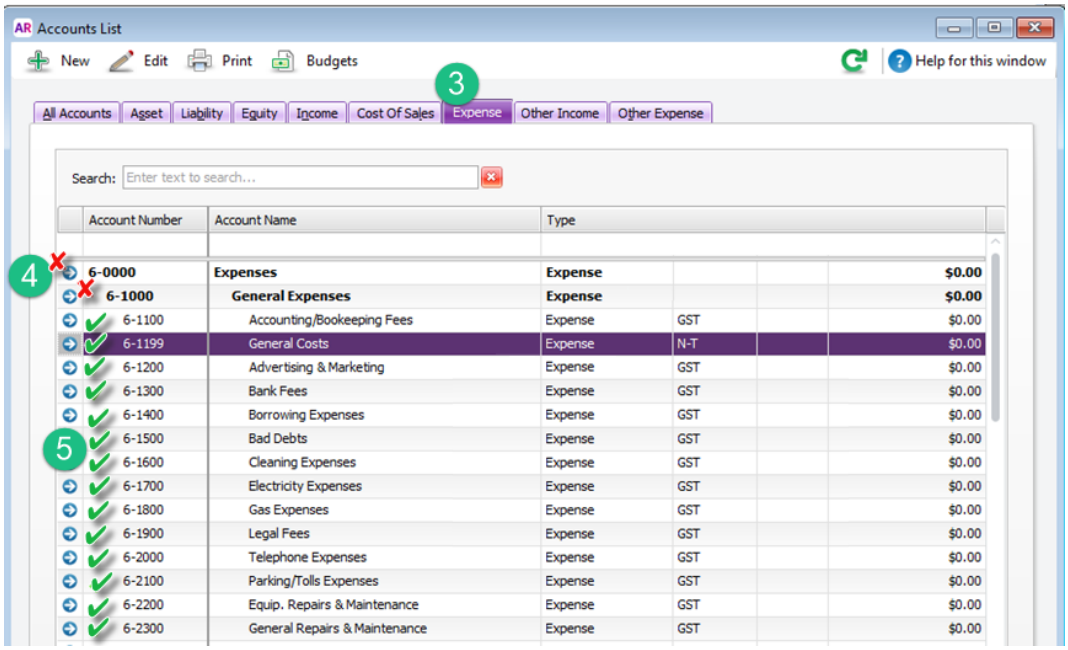
1. Click on Accounts
2. Head to your Accounts List



Expense account (purchasing)

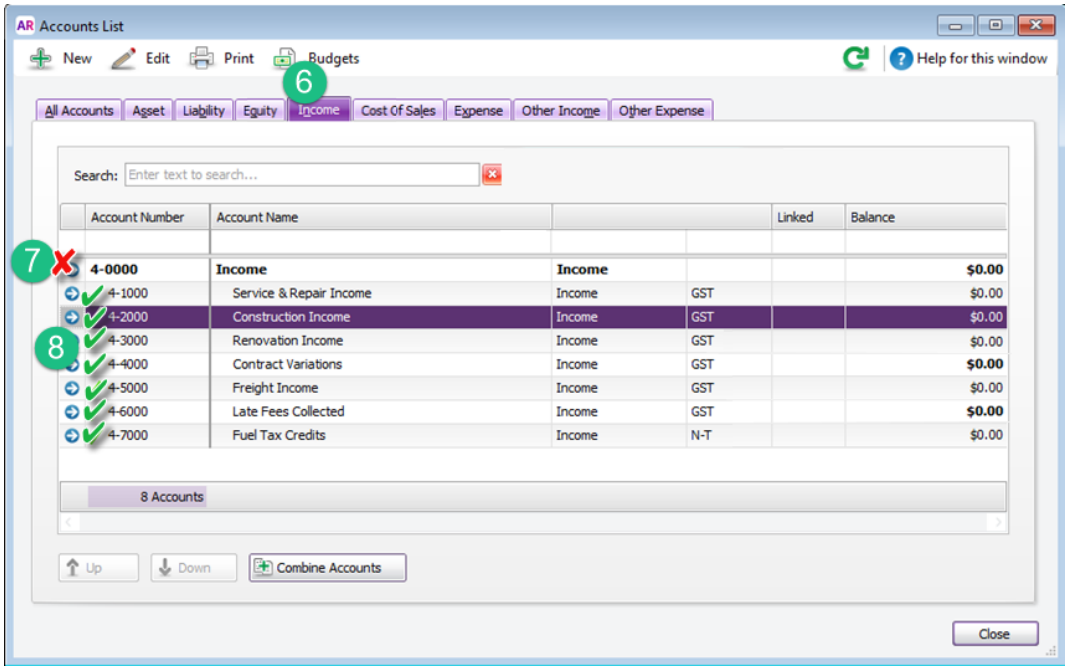
This is the account which you'll send purchase information to, by definition this is an "expense" account. Below are ticked and crossed suitable and not suitable accounts within my MYOB account.

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



Revenue account (client invoicing)

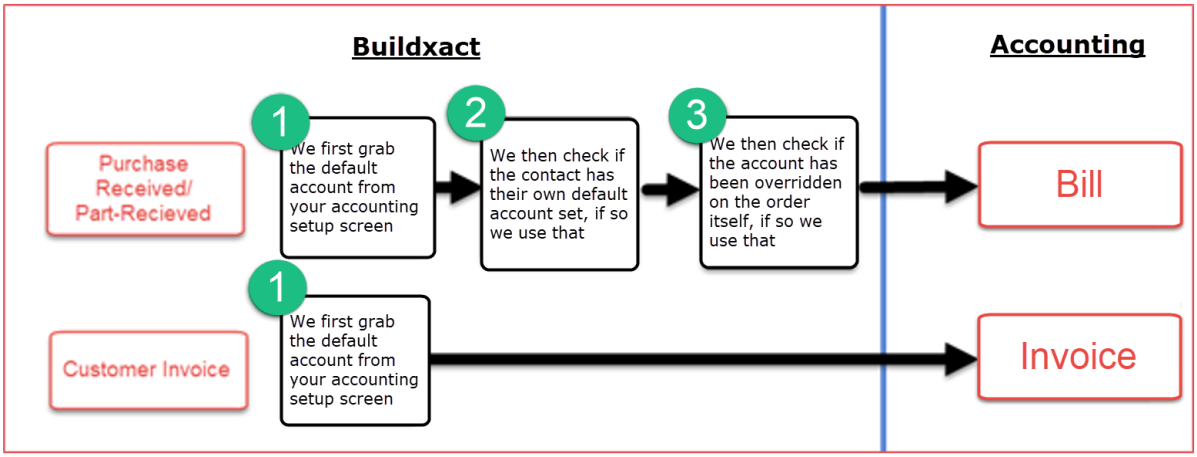
6. Click on the Income tab
7. 4-000 is just a summary account and hence you cannot send information to them
8. The accounts you want to use will fall below the summary account. In this example we're using Construction Income



How does MYOB know which account to use?

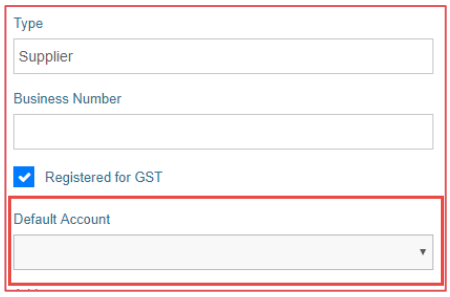
When we send a purchase or invoice to MYOB, we also send the "to" account which controls which account in MYOB the item lands in. This is quite a flexible process meaning you can change the account an item will go to within MYOB at several points.

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



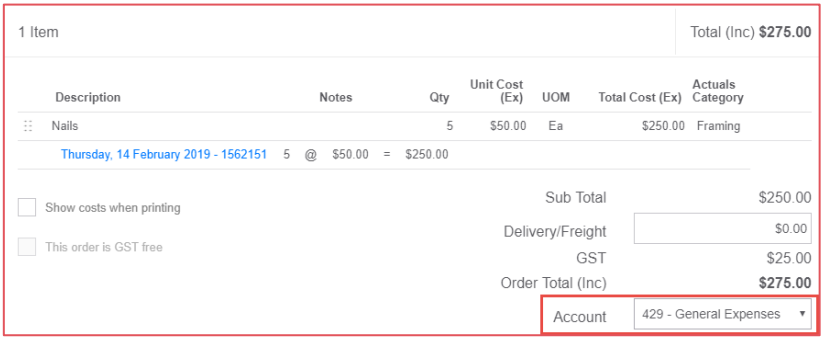
Setting a default account on a contact

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.

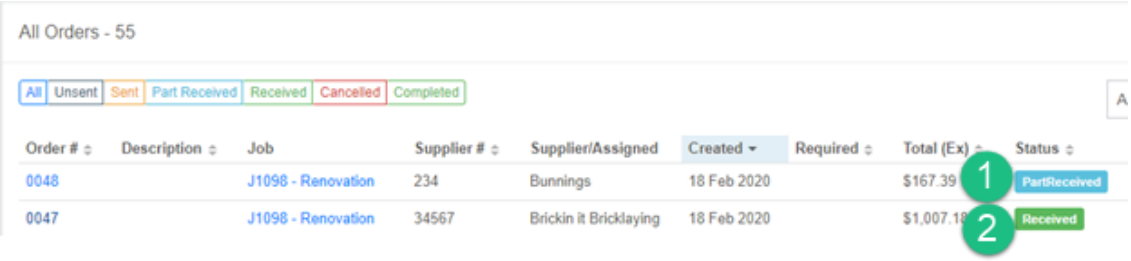


Syncing with MYOB

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

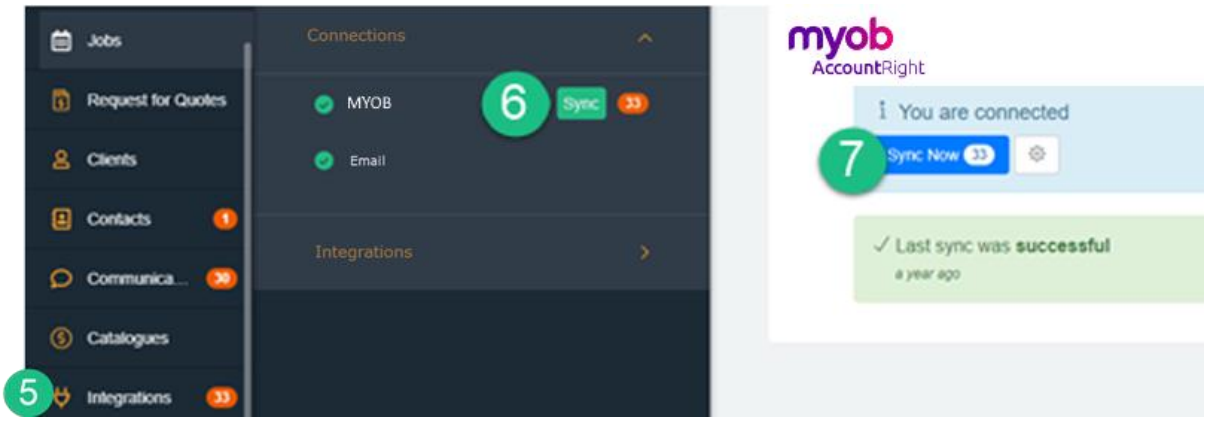
1. Purchase Orders marked “Part Received
2. Purchase Orders marked as “Received”



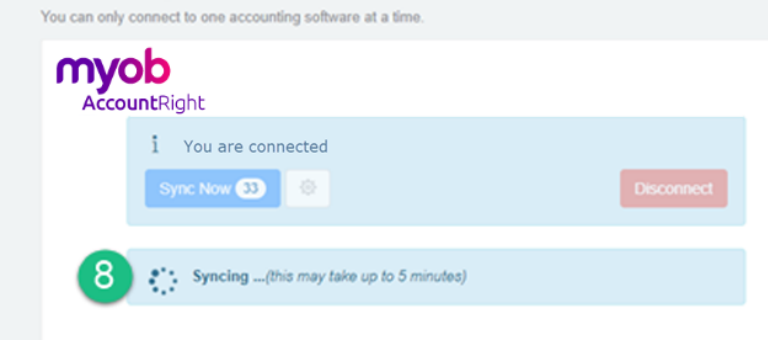
3. Customer invoices marked as “Invoiced”
4. Customer invoices marked as “Received”

How to sync

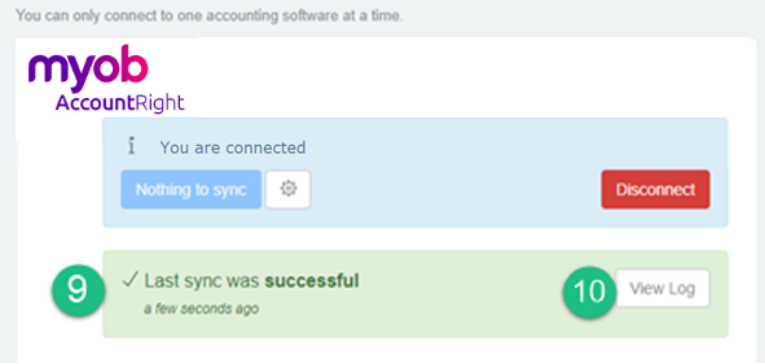
5. The “Integrations” tab will have the number of items to sync
6. Click the green “Sync” button
   OR
7. Click the blue “Sync now” button on the integrations screen



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

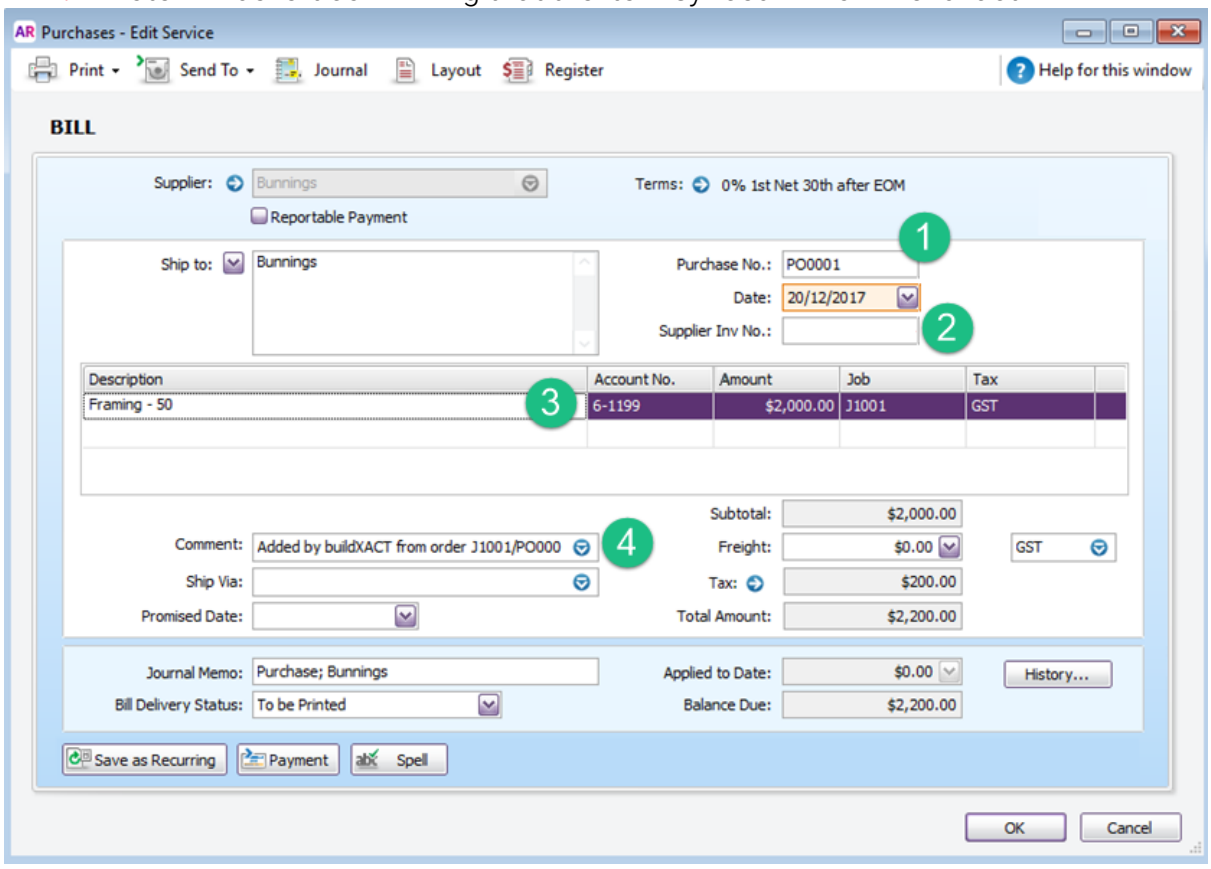


What the data looks like in MYOB

Supplier and Contractor Purchase Orders

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

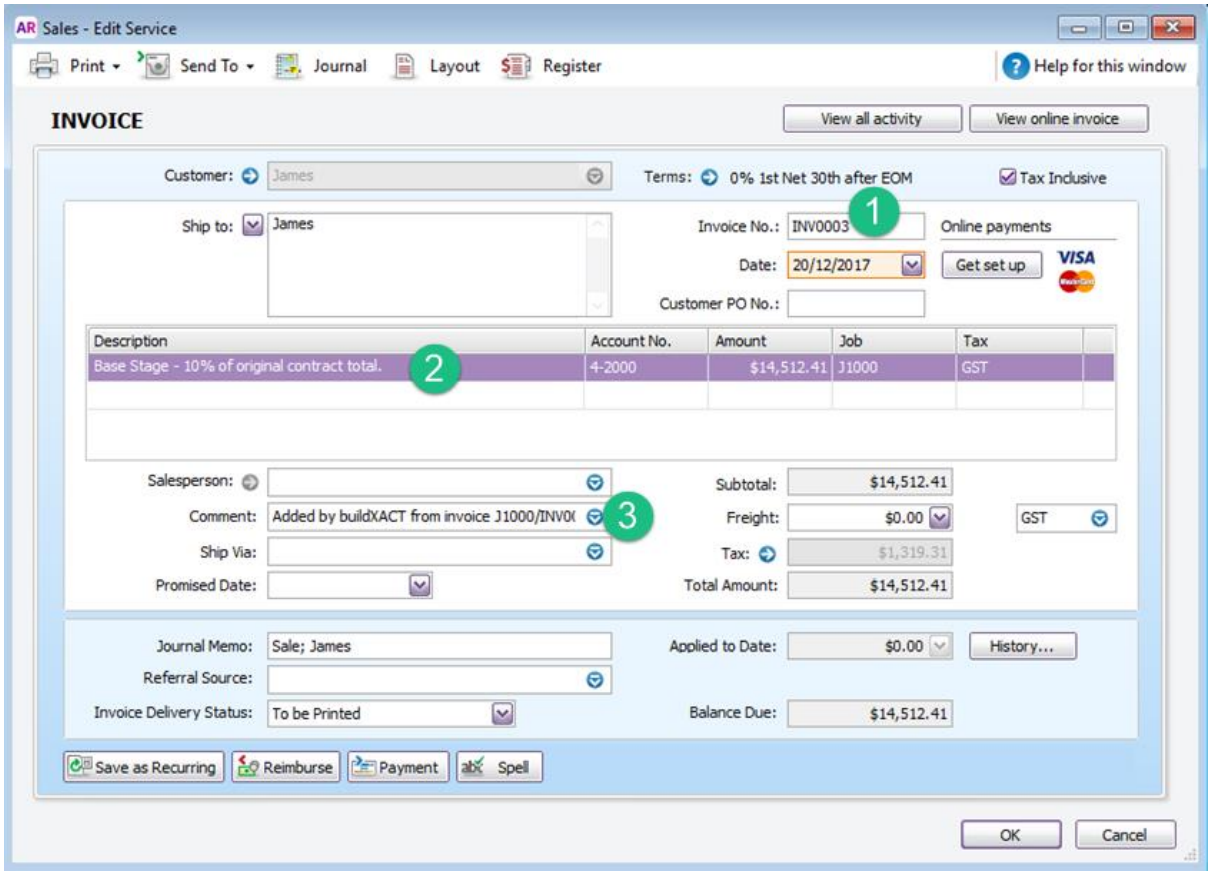
1. The purchase number will come through from Buildxact
2. If you add a receipt/invoice number in Buildxact it will add here
3. We bring across the item detail and assign the account within MYOB
4. A note will be left confirming that the item synced in from Buildxact



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



Frequently Asked Questions (IMPORTANT)

Resyncing to MYOB

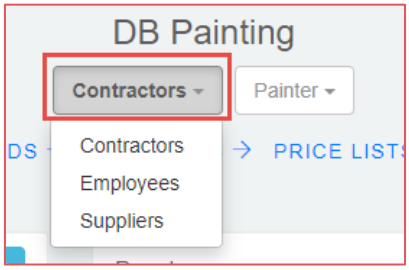
If you sync an item to MYOB, and then make subsequent changes to that item within Buildxact, the item DOES NOT UPDATE within MYOB. The item will need to be manually updated in MYOB as well. Once an item has been sent across, it will not send again, even after changes, as re-sending may lead to duplicates.

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

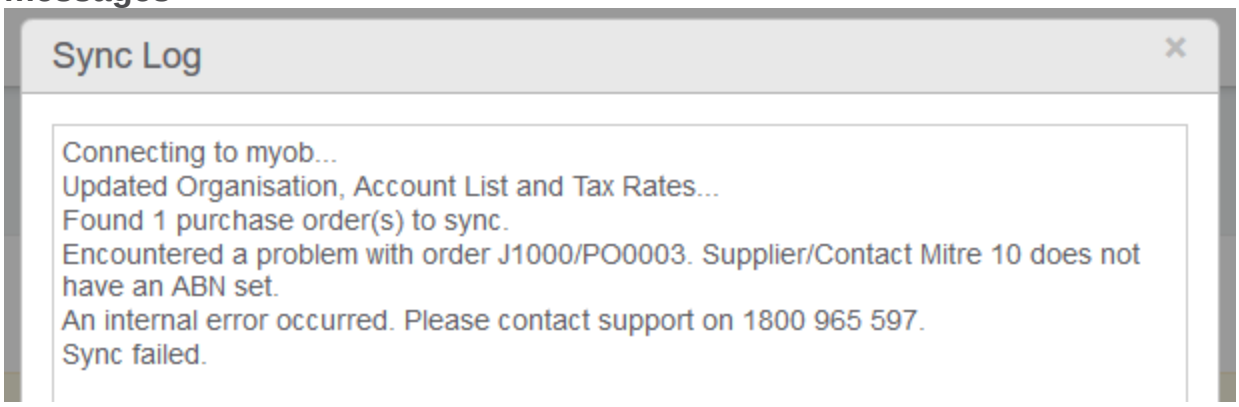
If you want Buildxact to send items to a Supplier Expense account and a Contractor Expense account in MYOB, then we must know which of your contacts are Suppliers and which are Contractors. Please be doubly sure to have this set right for all your contacts as shown.



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.