MYOB Greentree

Release Notes

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Version Information

Release 2018.1.0 contains a major new feature in MYOB Greentree Desktop, along with enhancements to MYOB Greentree Desktop and MYOB Greentree Browser.

In Greentree Desktop, we've added support for Single Touch Payroll reporting. We've also changed Greentree Desktop's look and feel, and have updated the User Preferences form.

In Greentree Browser, we've added the ability to get directions to a customer's address from the map on the Call and Service Request forms.

Customisation

Greentree Desktop - New Look and Feel

Greentree Desktop has a new skin that gives it a more modern look. We've done this improve the software's usability and to align Greentree Desktop's look and feel with MYOB's other products.

Here's an example of a form with one of the old skins:

And here's the same form with the new skin:

The new form is more compact, but contains the same fields and controls as the old one. As well, the font on the new form is easier to read.

Notes:

- You can no longer change Greentree's skin on the User Preferences form or assign skins to users. In some cases, you can apply an alternate skin to Greentree Desktop. See below for more information.
- We've removed the **Read only** and **In error colour** options on the **General** tab of the User Preferences form.

Using an Alternate Skin

You or your customers might be using skins to distinguish between test or demo systems and a production system. For those circumstances, we've created an alternate skin for Greentree Desktop.

To enable the alternate skin, add this option to the either the *jade.ini* or the *jadegt.ini* file on the database server:

[JadeServer]
MYOBGreentreeSkin=

You can specify *Alternate* or *Normal.* If you set any other value, Greentree uses the standard skin and a warning is logged to the file *default.log* in the server's \system folder.

Impact of the New Skin on Custom Forms

If you have customised software which has been developed by your Partner or VADs then the changes to Greentree Desktop's look and feel could impact your forms. You can identify if changes are required by looking for these issues:

- Labels overlap or are truncated
- Improperly aligned fields
- Fonts size is large
- Icons are the incorrect size

All VADs have been notified of this change, but may not have implemented the changes. All custom schemas and forms need to be checked.

If you notice issues like the ones listed above, contact the VAD responsible for the customisation. If you believe this is not a problem with a customisation, contact MYOB Greentree Support.

- Reference:
- Type: Enhancement
- Release version: 2018.1.0

eDocs

eDocs - Disable the Automatic Loading of the Requisition Tab

We've added the **Manual Load** option to the **Supplier Type** form. This option enables or disables the automatic loading of the **Requisition** tab for associated suppliers. Disabling automatic loading of the **Requisition** tab speeds up the loading of the **Supplier Type** form when you have a large number of records visible on it.

- Reference:
- Type: Enhancement
- Release version: 2018.1.0

eDocs - Approve All Line Items on Hold

You can now approve on-hold line items in eDocs AP Invoices and Credit Notes. To use this feature, right click on a line item in an invoice or credit note. Then, select **Approve All - On Hold**. A window displays, where you can change the hold code and the amount of the hold (if necessary).

After you change the code, another window displays, in which you must enter a reason for the change. eDocs saves what you type in an Action Note on the eDoc, which an administrator can review.

- Reference:
- Type: Enhancement
- Release version: 2018.1.0

eDocs - Issues Fixed in Release 2018.1.0

We've fixed these issues in release 2018.1.0 of eDocs:

- When you use the **Copy Line** function on the **Recently Used eDocs** line, the line will update and display the matched value.
- You can set Transaction Analysis Codes as mandatory against general ledger accounts. eDocs applies the principal to general ledger lines selected on the eDoc and forces the Transaction Analysis Code when necessary.
- When drilling down to a transaction code from a browser report, the report now only shows the value for the transaction code defined in the report definition for the row.
- The Workflow Desktop now automatically updates when you assign eDoc records to users. You no longer need to manually refresh the Desktop to force an update.

- When an eDocs AP Invoice for a company is imported from a Workflow panel in a different company, the currency exchange rate of the company the eDoc is assigned to is used when generating the invoice.
- The requisition type for a fixed asset now displays on eDocs AP Invoices.
- On the eDocs AP Invoices and Credit Notes **Favourites** tabs, the transaction trees selected on the original line are no longer overridden with the transaction trees entered on a copied line.
- Selecting and unselecting statement lines now correctly updates the matched total of an eDocs statement.
- When you drag an eDocs transaction from one desktop panel to another, the panel now dynamically updates.
- eDocs now can create AP Invoices for JC jobs that are closed or finalised.
- An expense claim's tax inclusive or tax exclusive amount is now honoured based on what's selected for the supplier and not on what's set on the corresponding expense receipt.
- The description of a work center now appears in the **Work centre** column of eDocs AP Invoices.

- Reference:
- Type: Bug
- Release version: 2018.1.0

GT

New Online Help for Greentree Desktop

We've moved the Greentree online help to the web. It's now available on the [MYOB Greentree Education Centre](#).

You can [access the help](#) from within Greentree Desktop by selecting **Help > Online Help**. You can also jump to the help for individual forms by clicking the help icon (⊘) on the form.

Removing the Old Help Files

We don't automatically remove the old .chm help files as some sites have custom help content. However, you might want to remove those files - they take up 200 MB of space on the Greentree server and on every workstation that connects to the server via thin client. Removing the files frees up that space and halves the time it takes to download thin client files.

To help you do that, we've provided a system script which you can find by selecting **System > Utilities > System Scripts > Generic > Help - Delete redundant Help (chm) files**.

To remove the files:

- From the *server*, start a Greentree session on the server and run the script.
- From a *workstation*, start a thin-client session and run the script.

- Reference:
- Type: Enhancement
- Release version: 2018.1.0

Greentree Desktop - Issues Fixed in Release 2018.1.0

We've fixed these issues in release 2018.1.0 of Greentree Desktop:

- A 1090 error no longer displays when you try to preview an EMS (Employer Monthly Schedule) file from the Tax Remittance Report form.
- EMS files sent to New Zealand Inland Revenue now contain values for *all* pays in the date range set in the Tax Remittance report.
- Users who belong to multiple teams no longer lose access to the modules they're assigned to when one of the teams changes.
- Inactive suppliers no longer appear in the **Supplier Details** section of Purchase Order Entry and Requisition Entry forms when a user with **Team** privileges views or edits the form.

- You can now import quotes with purchase activities using the FREE getCRMQuote function.
- We've changed the way Greentree Desktop validates automatically-generated complex passwords to ensure that you can only include valid special characters in passwords.
- Where a Foreign Currency organisation is not linked to a customer and a price exists for both foreign and local currencies, Greentree Desktop returns the foreign currency price.
- Enterprise search live indexing now works correctly for sites with and without access to the Greentree Browser client.

- Reference:
- Type: Bug
- Release version: 2018.1.0

Payroll

Greentree Desktop - Support for Single Touch Payroll (Australia)

MYOB Greentree Desktop now supports Single Touch Payroll (STP), an Australian Tax Office (ATO) payroll reporting initiative that goes live on 1 July 2018. With STP, employers send payroll information ? including salary and wages, tax, and superannunation ? to the ATO when they pay their employees.

STP streamlines payroll reporting to the ATO. It also ensures that your employees see more up-to-date wage and tax information when they log into the myGov website. For more information about STP, visit the [ATO website](#).

Note: In FY 2018/2019, Single Touch Payroll reporting only applies to employers with *20 or more* employees.

Initial Setup

You must do some setup on these forms before you can report payroll via STP:

- Country Maintenance
- HR System Options
- HR Module Control

Country Maintenance Setup

Make sure that the company's country is set to *Australia* on the Greentree **Country Maintenance** form. To do that:

1. Go to **System > System Setup > Country Maintenance**.
2. Select **AUS** from the **Code** list.
3. Select **AU** from the **ISO 3166 Code** list.

Setting HR System Options

If you're a site that acts as a registered tax agent for your clients, you must include your agent information in STP lodgements. To configure Greentree Desktop to include that information in STP submissions:

1. Select **HR > System > System Options**.
2. Click the **STP** tab.

3. Select the **Lodge STP data as a registered agent** option and entering this information:

   - **Registered agent ABN** ? Your Australian Business Number.
   - **Registered agent number** ? Your agent number.
   - **Contact Name** ? The name of the person the ATO can reach if there's a problem or if the ATO needs more information.
   - **Phone** ? The contact person's telephone number.
   - **Email** ? Optionally, enter the contact person's email address. This can be up to 200 characters.
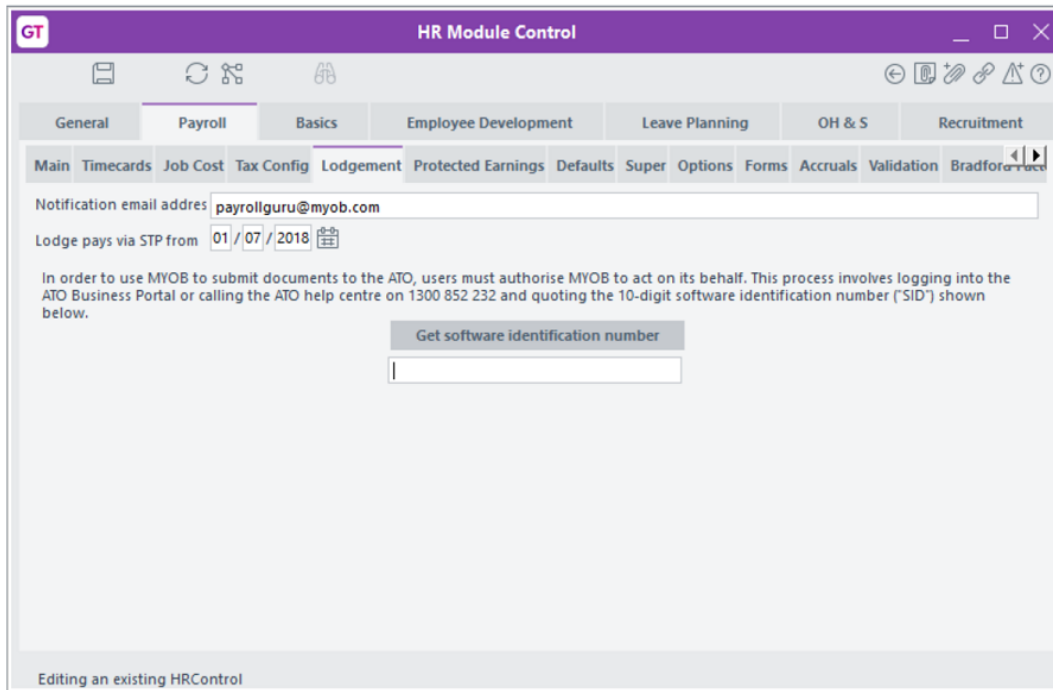4. Click **Save**. This message displays:

5. Click **Yes**.

HR Module Control Setup

To do STP setup on the HR Module Control form:

1. Select **HR > System > Module Control**.
2. Click the **Payroll** tab and then click the **Lodgement** sub tab.

3. Set these options:

? **Notification email address** ? Enter the email address that will receive notifications about STP submissions ? for example, if the ATO didn't receive a submission.

? **Lodge pays via STP from** ? Set the date from which you will start reporting payroll using STP. Lodgements made *before* this date aren't included in STP submissions.

? **Get software identification number** ? Click this button to get a 10-digit code that authorises Greentree to do STP reporting on your behalf. To complete the authorisation, log into the ATO Business Portal or call the ATO help centre. When asked, provide the 10-digit code.

4. If you selected the **Lodge STP data as a registered agent** option on the **STP** tab under **HR > System > System Options**, you must:

- Enter the name of the person at the company who is affirming that a registered agent is authorised to do STP reporting.

- Enter the date on which the declaration is being made.

Setting Employee and Transaction Type Options

You also need to set up:

- Employees
- Transaction Types

Setting Up Employees for STP

On the **HR > Employee Maintenance** form, make sure that employees have:

-

A date of birth and an email address entered on the **Main** tab.

- A Tax File Number entered on the **Tax Config** tab

Note: You can exclude employees from STP reporting ? because, for example, they're a contractor ? by selecting **Do Not Print** from the **Payment Summary** list on the **Tax Config** tab.

Select the **Include in next submission to the ATO** option to the **Tax Config** tab to ensure that a new employee's information is sent to the ATO in the STP submission when that employee is first paid.

Note: You don't need to select this option for existing employees.

Setting Up Transaction Types

We've added an **STP** tab to these forms under **HR > System > Payroll > Transaction Types**:

- Transaction Type - Pay
- Transaction Type - Deductions
- Transaction Type - Tax
- Transaction Type - Employer Costs

Use this tab to set up the [transaction types](#) that you need to report in STP submissions. To do that:

1. Select **HR > System > Payroll > Transaction Type**.
2. Choose the form for the transaction type that you want to set up.
3. Click the **STP** tab on the form.
4. Select the transaction type from the **Unselected** list.
5. Click the **>** button.
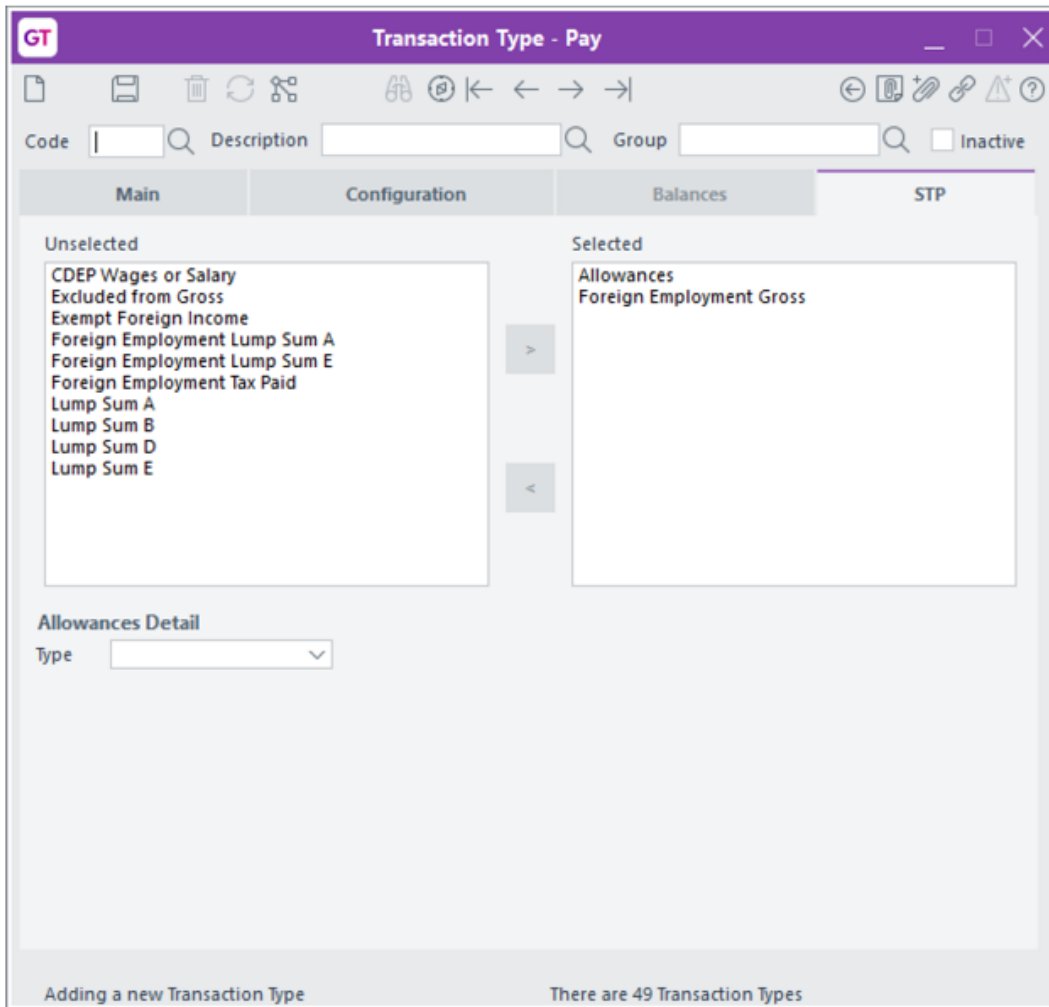
6. Repeat steps 4 and 5 for each transaction type you want to include.
7. Click the **Save** icon on the toolbar.

Note: If you select **Allowances** on the Transaction Type - Pay form, you can choose an option from the dropdown list that displays.
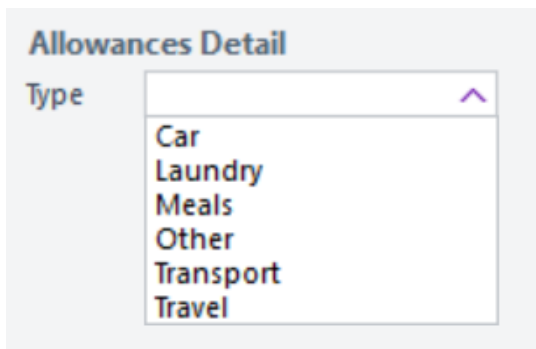
Selecting **Other** from the list displays a field in which you can enter a short description of the transaction type. If you don't enter a description, the field is blank in the STP submission and when you view or edit allowances on the **Allowances** tab of the **Payment Summary Configuration** form.

Sending Payroll Information to the ATO

Now that you're set up, you can send payroll information to the ATO at the same time you process a pay run. To do that:

1. Create a payment in Greentree Desktop.
2. On the **Create Payments** form, find the **Payment Log** for the payment you created.

3. Click **Create Lodgement**. The **STP Lodgement** form displays.

Note: The **Create Lodgement** button isn't available if the payment's date is *before* the **Lodge pays via STP from** date that you set in HR Module Control.

4. If you want to review the details of the lodgement before submitting it, click the **Preview** button. This saves the details of a lodgement as an XML spreadsheet which you can open in Microsoft Excel.

5. Select the **Tick this box to sign this declaration with the AUSkey used by this software and your login details** option.

6. Click **Submit**. An error message displays if there are problems with the submission (for example, an employee's record is missing their date of birth). You must resolve the problems before you can submit the lodgement.

7. If there are no problems, the **Lodgements** form displays.

Use the **Lodgements** form to monitor the progress of a submission. The form contains these options:

- **Show successful** ? By default, Greentree only displays lodgements that are still being submitted to the ATO, lodgements with errors, or lodgements which have failed. Select this option to display lodgements that have been successfully submitted to the ATO.
- **Check now** ? Checks and displays the status of the lodgement, including information about errors. Here's an example of an error:

Location: Employee - 1000 AMANDA ALGER
Severity: Error
Property: Payee.ContactDetails.Email
Summary: Email Address contains invalid text
Detail: A text character must be one of the following: A to Z a to z 0 to 9 ! @ $ % & * ( )
                - _ = [ ] ; : ' " , . ? / or a space character.

Note: The **Check now** button is only available if the lodgement hasn't been completed.

- **Review** ? Saves the details of a lodgement as an XML spreadsheet, and you can use this information to perform a reconciliation if necessary.
- **Resubmit** ? If there were errors with the lodgement and you've corrected them, click this button to submit the lodgement to the ATO with a new identifier. Clicking this button adds the details of the resubmission to the original submission log.
- **Output logs** ? Saves all information about the lodgement to your computer as a JSON file. You can forward this file to your Greentree consultant or to MYOB support if you encounter problems.
- **Support details** ? Click this button to view details of a lodgment? including the registered agent's ABN, the transaction ID, and the date and time the submission was made. This information will be required if you need to query a lodgment.

How Greentree Submits STP Reports

If the first attempt to send the lodgement to the ATO isn't successful, Greentree resends it every minute for the first 15 minutes. Over the next few hours, Greentree tries to resend the lodgement every five minutes, then tries every hour until the transmission is successful or has failed.

If a lodgement isn't successful after 24 hours, Greentree sends an email to the default notification address to let you know that

it is still trying to submit the lodgement to the ATO. If you receive the email, determine the cause of the problem ? for example, the ATO website is down or there is a problem with your internet connection or with the configuration of your web server.

Updating a Lodgement

There will be times when you'll need to update a lodgement ? for example, after you've changed an employee's address or added Fringe Benefit Tax information. To update a lodgement:

1. Select **HR > Payroll > Other Functions > STP Update Lodgement**.

2. Select a **Pay Group**, an **Employee**, or a **Branch** of your company.
3. Select the year to which the update applies from the **Year ending 30th of June** list. For now, that's **2018**.
4. Click **Search Now**. Greentree returns a list of the employees who match the search criteria you specified.
5. Select the employees for whom you want to perform the update and then click **Create Lodgement**.
6. The **STP Lodgement** form opens.

Follow the instructions for sending lodgements to the ATO to update the lodgement.

Cancelling Lodgements

You can cancel lodgements reported via STP if, for example, the pay run contains errors or if the initial submission to the ATO failed.

If the initial submission reached the ATO, Greentree sends an amendment to the submission. The amendment reduces the amount paid to zero and sets the year-to-date earnings for each employee back to the amount before the original submission was made.

To cancel a lodgement:

1. Select **HR > Payroll > Finalise Pays > Cancel Payment**.
2. Click **Payment Run**.
3. Select the **Payment Log** for the payment you want to cancel.
4. Optionally, enter a **Description** and **Narration** for the cancellation.
5. Enter the date on which you want to cancel the lodgement in the **Cancel Date** boxes.

6. Click **Process**. A confirmation message displays.
7. Click **Yes** on the message.

Deleting a Lodgement

You can delete lodgements reported via STP on the **Lodgements** form. To do that:

1. Select the lodgement in the table at the top of the **Lodgements** form.
2. Press Shift+F2. A confirmation message displays.
3. Click **Yes** to delete the lodgement.

Submitting the Final Payment for the Tax Year

You can create the final payment for the tax year on the **STP Update Lodgement** form. The final payment is a declaration that you've sent the ATO all of the required information for that year.

If you submit the final payment for the year, you don't need to provide payment summaries and a payment summary annual report to the ATO. Using the information that you sent via STP during the year, the ATO will pre-fill employee information on their tax returns and in the myGov portal.

Note: You must submit the final payment within 14 days of the end of the tax year.

To submit the final payment for the year:

1. Go to **HR > Payroll > Other Functions > STP Update Lodgement**.
2. Select a **Pay Group**, an **Employee**, or a **Branch** of your company.
3. Select the year to which the final payment applies from the **Year ending 30th of June** list.
4. Click **Final for year**.
5. Select either:

? **All paid employees**, or

? **Selected paid employees**. Choose the employees for whom you're creating the final payment by clicking the **Select** option in the table.

Select	Code	First name	Surname	Pay group	Branch	Start date	Term date
☑	1002	APRIL	ASTON	Monthly	01	03/05/2008	
☑	1004	CHELSEA	CORK	Monthly	02	14/10/2009	
☑	1008	STEVE	SIMPSON	Weekly	01	20/03/2010	
☑	CLARKC11	Craig	Clark	Monthly	01	12/12/2005	
☑	PETERSK	Kathy	Peters	Weekly	03	01/01/2011	

6. Click **Create Lodgement**. The **STP Lodgement** form opens.
7. Follow the instructions for sending payments to the ATO.

- Reference:
- Type: New feature
- Release version: 2018.1.0

Greentree Desktop - New Zealand Employee Share Scheme Reporting Changes

To comply with new Inland Revenue Department (IRD) rules, we've changed to the way in which Greentree reports Employee Share Scheme (ESS) benefits. The ESS benefit now appears as a separate record in the Employer Monthly Schedule sent to the IRD. Greentree reports the ESS benefit whether or not PAYE has been withheld from the employee.

A separate ESS line for an employee's pay record now appears when you run the Tax Remittance report under **HR > Payroll > Other Functions > Tax Remittance Report**.

- Reference:
- Type: Enhancement
- Release version: 2018.1.0

WebView

WebView - Issues Fixed in Release 2018.1.0

We've fixed these issues in release 2018.1.0 of WebView:

- We've fixed a problem where transaction tree codes were missing from WebView reports.

- Reference:
- Type: Bug
- Release version: 2018.1.0

Workflow

Greentree Desktop - New System Script to Show Background on Desks

We've added a new system script that sets the **Show Background** option for Workflow desks. You can find the script by selecting **System > Utilities > System Scripts > Set Show Background on desks**.

Run the script, and click either:

- **All desks**.
- **Selected desks** and choose the desks to which you want apply the **Show Background** option.
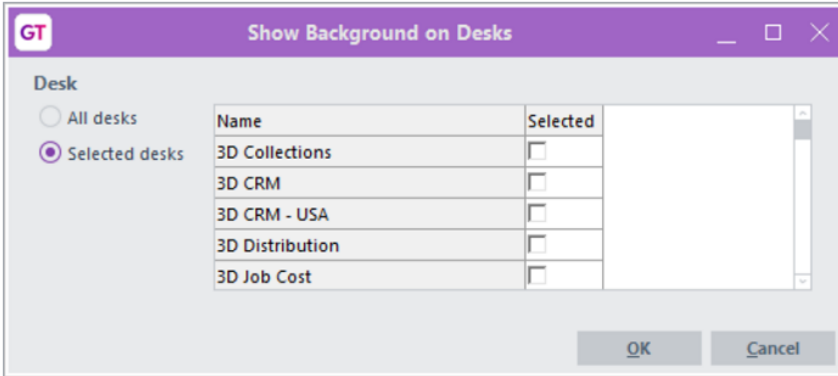
- Reference:
- Type: Enhancement
- Release version: 2018.1.0

Browser Licensing

Greentree Browser - Get Directions from Maps

If you're working with Calls or Service Requests in Greentree Browser, you can now get directions to a customer's location on the map on the **Address** tab.

Open a Call or Service Request, then tap the **Address** tab. Tap the asterisk menu and then tap **View large map**. A Google Map opens in a new browser tab, with the **Directions** panel displayed.

The customer's address populates the **Destination** field in the the **Directions** panel. If you have GPS or location services enabled on your device, your current location populates the **Starting Point** field. Otherwise, you need to type the address of your current location in the **Starting Point** field.
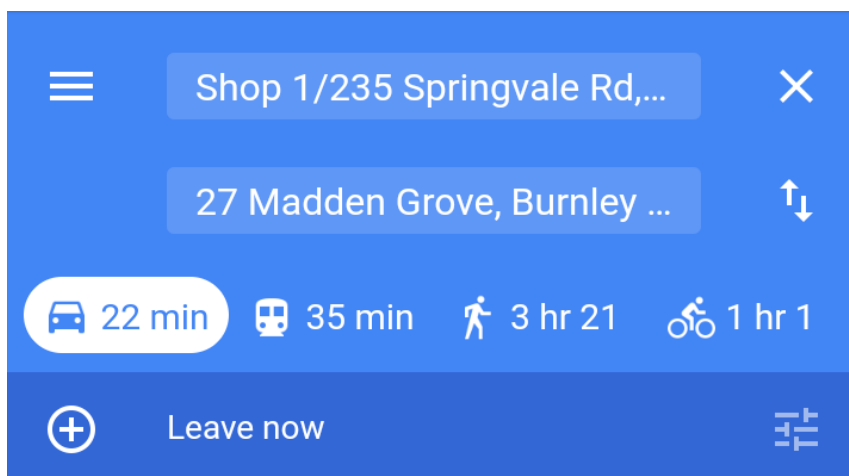
Tap the **Search** icon and choose the directions that work best for you. If you're logged into Google, you can tap **Send directions to your phone**. You can also print the map if you want a hard copy.

- Reference:
- Type: New feature
- Release version: 2018.1.0

Jade

Greentree Desktop - Changes to Object Identifiers Output by JADE ODBC Library

The format of object identifiers changed in JADE 7.1.08. This change applies to the pseudo property *oid* and all references ? for example, *myCustomer* ? output by JADE ODBC.

The format of the identifiers changed from *ccccc.iiiiiiiiii* (five digits for the class number and 10 digits for instance number, both padded with zeroes) to *ccccccc.iiiiiiiiiiiiiiiiiiii* (seven digits for the class number and 20 digits for the instance number).

These fields are correctly defined as strings, not numbers, and third-party applications like Qlik correctly retrieve the values from the database. If you're using Qlik, it re-interprets the values as numbers and stores them as *ccccccccc.00000000000000000001*. All objects of the same class are given the same identifier. This leads to errors, particularly when performing JOINs.

To resolve this problem, we've changed the format of the object identifiers output by JADE's ODBC library. This was done by changing JADE's ODBC library and by adding a new setting in the file *jade.ini*.

Note: Storing keys as strings instead of decimals may degrade Qlik's performance with extremely large data sets.

Adding the INI File Setting

The INI file setting changes the separator used in the object identifier from a dot character to an underscore (_). The underscore prevents Qlik and other applications from re-interpreting the identifiers as numbers and causes it to store the identifiers as strings.

The pack changes the setting in the INI file used to run Packman. If you use a separate INI file for running Greentree RAP, you must find or create the *JadeOdbc* section in the file *jade.ini*. Then, set the key *OidFieldSeparator* to an underscore. For example:

```
[JadeOdbc]
OidFieldSeparator=_
```

If you manually change the setting in the INI file, you must to restart the server to apply the change.

This change does not apply to the format of object identifiers used with the WHERE clause of a SELECT statement. In that case, the identifiers will be in the old format, regardless of the new INI file setting. Using:

*SELECT * FROM Customer WHERE Customer.oid = '000123@00000000000000000123'*

will *not* work.

Using:

*SELECT * FROM Customer WHERE Customer.oid = '000123.00000000000000000123'*

will work.

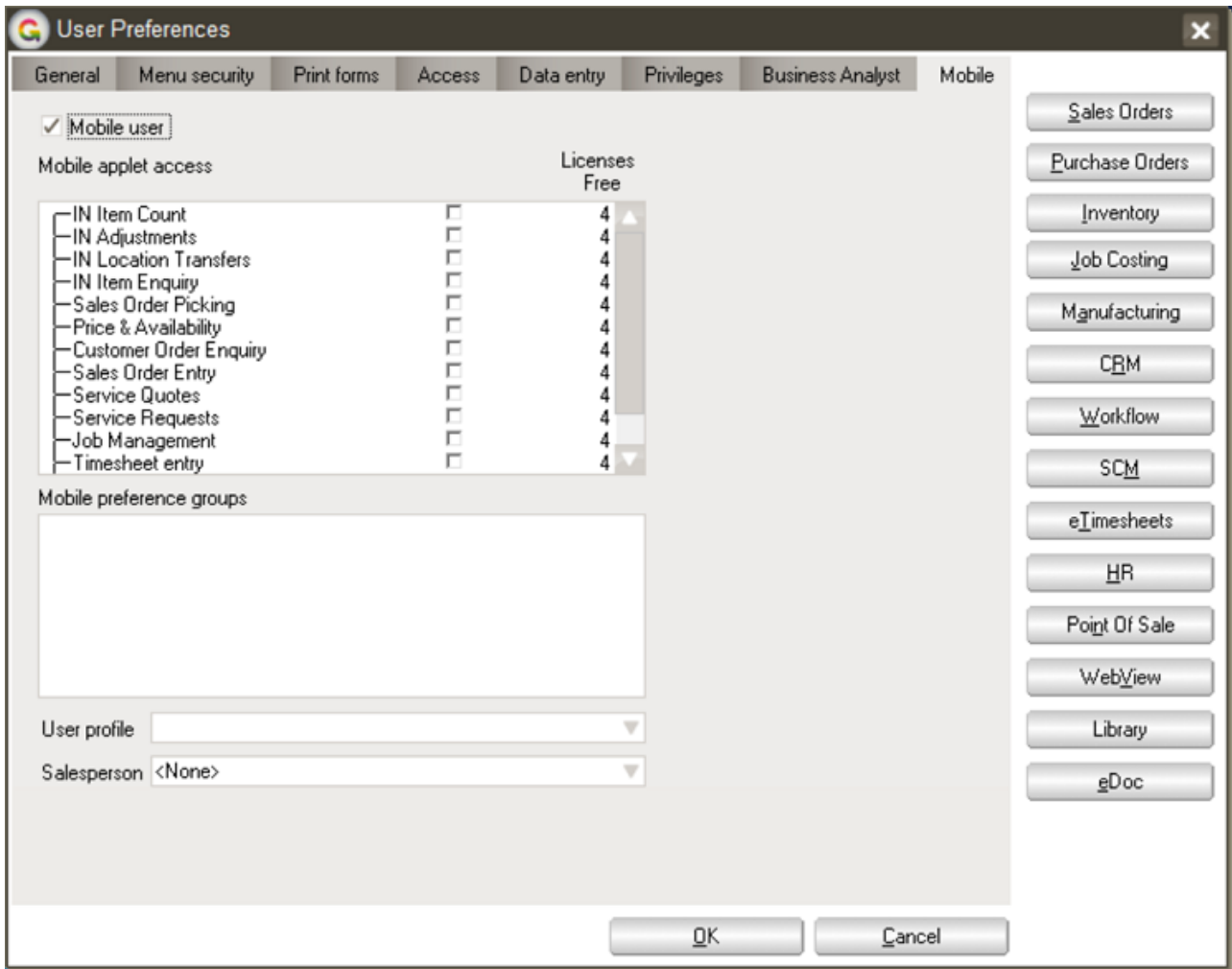- Reference:
- Type: Enhancement
- Release version: 2018.1.0

Not Assigned

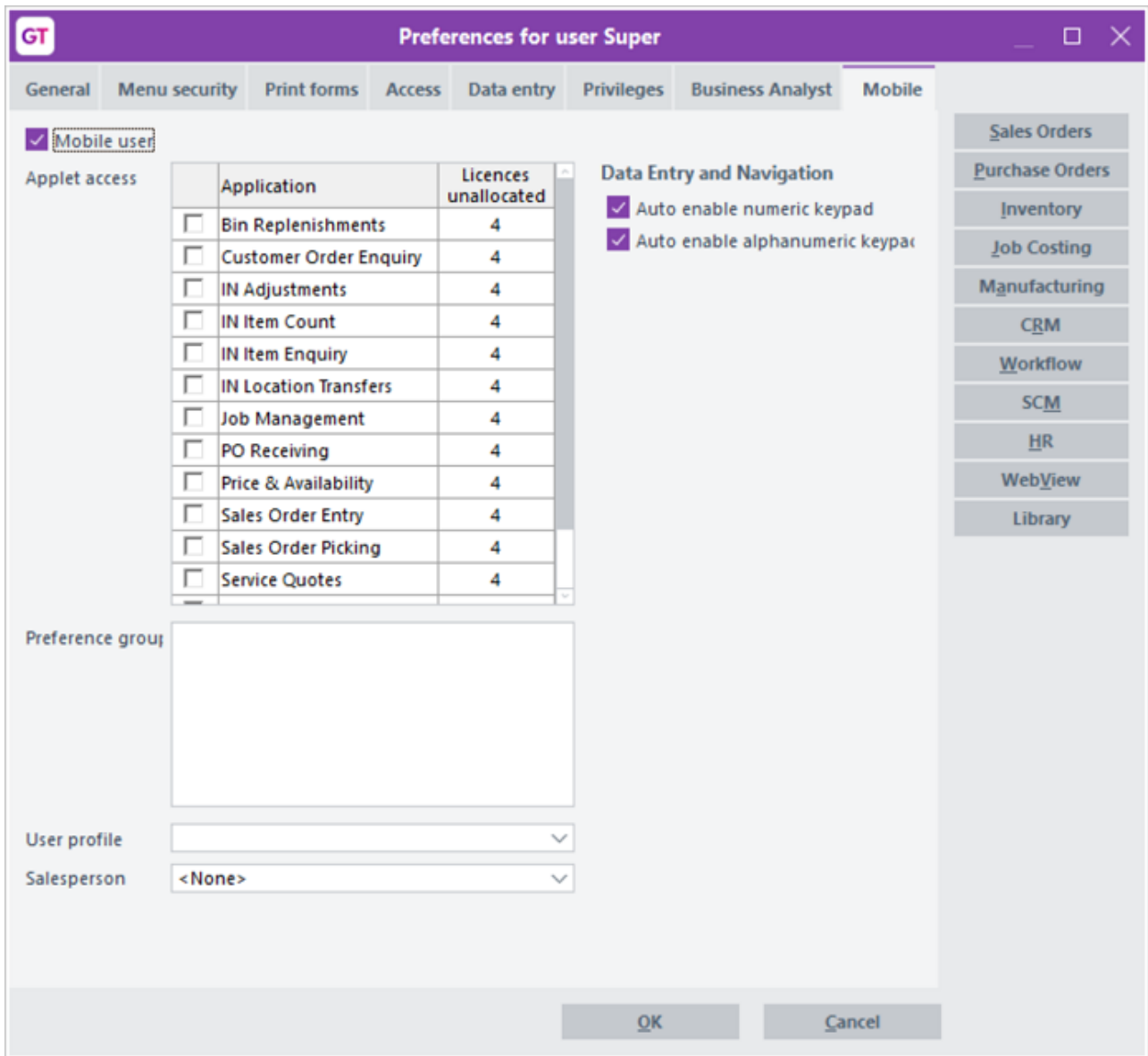### Greentree Desktop - User Preferences Form Update

We've changed the **User Preferences** form (found under **File > Preferences**) to enhance its usability and its performance. These changes include:

- Checkboxes are now to the left of options, rather than on the far right of the form.
- You can expand and collapse trees on the form using the left and right arrow keys on your keyboard.
- A three-column table replaces the tree list on the the **Mobile** tab, making it easier to select the options a mobile user will need.
- A **Search** box has been added to the **Menu Security** tab.
- Modules and suites are now listed in alphabetical order on the **Access** tab.
- The name of the user or team for which you're setting the preferences now appears in the form's title bar.

Here's the old User Preferences form (displaying the **Mobile** tab):

And here's the new form (also displaying the **Mobile** tab):

- Reference:
- Type: Enhancement
- Release version: 2018.1.0