

MYOB Greentree



Release Notes

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Version Information

Release 2019.1.0 contains new features in Greentree Desktop and enhancements to both Greentree Desktop and Greentree Browser.

In Greentree Desktop, we've changed the way the application calculates an employee's accrued annual leave. There's also support for Payday filing (in New Zealand), and we've added a new system script.

In Greentree Browser, we've expanded length of the **Code** field in the **Job** droplist on the Timesheet Entry form to 20 characters, and added a new column to the grid on the Timesheet Review form.

This release also fixes bugs in both Greentree Desktop and Greentree Browser.

Customisation

Greentree Desktop - Moving Trees in Windows Designer

When customising a form with [Windows Designer](#), you can now move trees out of their tables to *any* location on a form ? whether on the current tab, or on another tab. This enables you to only display a tree or branch that users need to view and use without, for example, hiding the tab on which the tree resides.

You can also:

- Customise the properties of trees ? for example, to make them read-only, hidden, or mandatory.
- Rename a tree.
- Delete a tree.

To move a tree out of its table:

1. On the Windows Designer form, select a customisation.

Note: Click the **Customised** option to display only customised forms.

2. Open the customisation and find the tree that you want to move.
3. Drag a tree from the table to a location on the form. This creates a control and a label for the tree on the form.
4. Save the customisation.
5. Click **View** in the Properties pane to review the customisation.

Note: The tree's **Location** column on the form indicates that a tree has been moved, and contains a link to the tree. You can click the link to jump to the tree's new location.

Supplier trees		
Tree	Branch	Location
Region-AUS		the form
Supplier Type-AUS		
Synchronisation Tree		

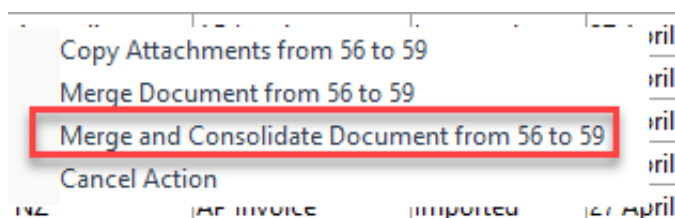
- Reference:
- Type: Enhancement
- Release version: 2019.1.0

eDocs

eDocs - Merge and Consolidate PDFs

When you drag one eDoc on to another one and they both have PDFs attached to them, the option **Merge and Consolidate Document** appears in the prompt that displays. Select this option to combine the PDFs from both eDocs into a single PDF,

and to delete the source eDoc.



If there are other attachments in the source eDoc ? for example, Word documents or images ? those are attached to the destination eDoc. You can view the additional attachments by clicking the **Attachments** button.

If you accidentally merge and consolidate PDFs, you can use the **Split PDF Document** function to pull the consolidated PDF apart. The process attaches both PDFs to the eDoc.

- Reference:
- Type: Enhancement
- Release version: 2019.1.0

eDocs - New Option in Form Headers

We've added the **Next** option to the headers of the eDoc Expense Receipt and the eDocs Expense Claim forms. When this option is selected and you scroll through the expense receipts and expense claims, eDocs restricts the view to the document type for which you or your team are authorised. The option remains selected until you deselect it.

- Reference:
- Type: Enhancement
- Release version: 2019.1.0

eDocs - Issues Fixed in Release 2019.1.0

We've fixed these issues in eDocs:

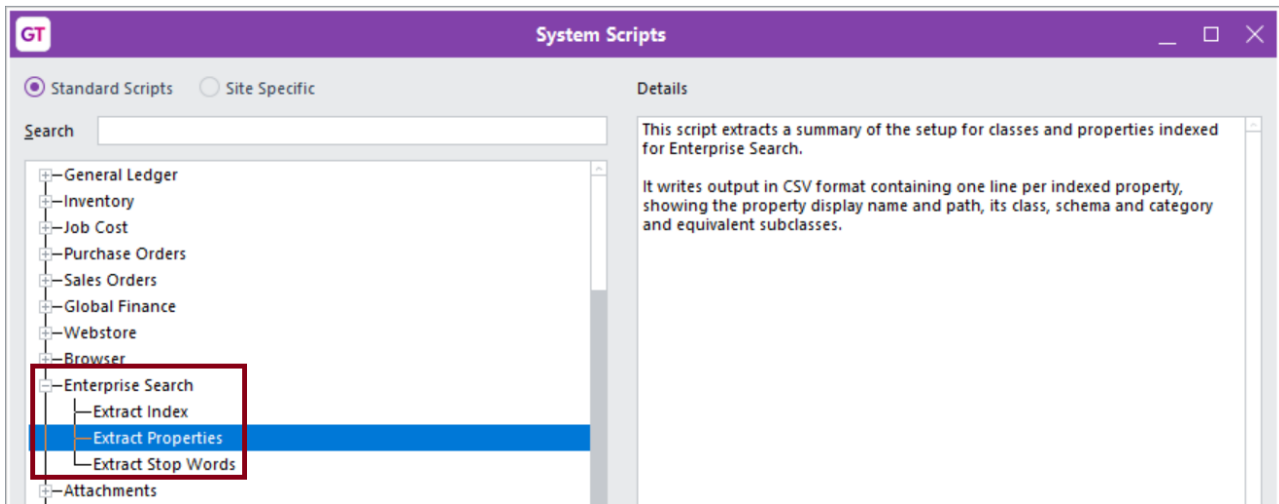
- The quantity of coding lines is no longer set to zero when you save or delete coded expense lines. Expense claims on AP invoices no longer convert to a zero quantity and a zero amount.
- The **PO Status** column on the **Purchase Orders** tab of the eDoc AP Invoice form now displays a value if you select the **PO Status** option on the Edit Column Headings form.
- The **Sell Rate** on a job cost line now updates when you change the activity code on the line.
- We've fixed an issue where users weren't able to enter more than nine characters in the **Tax Value** field or more than 10 characters in the **Value Incl Tax** field in an AP invoice's header.
- On the AP Invoice form, eDocs now handles exchange rates that contain more than 14 characters. *Error 14079 (The text size exceeds max length)* no longer displays when you enter a long exchange rate.
- *Error 1090 ? Attempted access via null object* no longer displays when you drill down to an inactive supplier from the eDocs transaction table or click the **View eDoc** button on an AP invoice.
- When you generate an AP invoice, eDocs no longer uses the eDoc reference as the invoice reference if you selected the option **Use Invoice Reference as BPay Reference** on the Supplier Maintenance form.
- We've introduced performance improvements when loading requisition types in the Requisition Types table.

- Reference:
- Type: Bug
- Release version: 2019.1.0

Enterprise search

Greentree Desktop - New System Script

Greentree Desktop now includes a system script called *Extract Properties*. This script, under the **Enterprise Search** tree on the System Scripts form, generates a Csummary of the setup for classes and properties indexed for Enterprise Search.



When you run the script, Greentree Desktop creates a CSV file that contains one line per indexed property. The file shows the property's display name and path, its class, its schema and category, and the equivalent subclasses. You can use the CSV file to determine what classes are included in Enterprise Search.

Here's an example of the script's output:

```
"Class","Schema","Category","Class Display Template","Property Display Name","Property Path","Subclasses"
"User","POSSchema","Business & People","User {name}","Email","emailAddress"
"User","POSSchema","Business & People","User {name}","Name","name"
"User","POSSchema","Business & People","User {name}","Real name","realName"
"Customer","CRMSchema","Business & People","Customer {name}","Mobile","mobile"
"Customer","CRMSchema","Business & People","Customer {name}","Address","myAddress.addressBlock"
"Customer","CRMSchema","Business & People","Customer {name}","Name","name"
"Customer","CRMSchema","Business & People","Customer {name}","Phone","phoneNumber"
"DeliveryAddress","GreenTreeSchema","Business & People","{name}","Name","name"
"GLAccount","GreenTreeSchema","Account Codes","GL Account {description}","Description","description"
"SalesPerson","GreenTreeSchema","Business & People","Salesperson {name}","Name","name"
"StockItem","CRMSchema","Inventory","{code}","{description}","Barcode","allBarcodes.code"
"StockItem","CRMSchema","Inventory","{code}","{description}","Alias","allStockCodeAliases.name"
"StockItem","CRMSchema","Inventory","{code}","{description}","Code","code"
"StockItem","CRMSchema","Inventory","{code}","{description}","Description","description"
"Supplier","CRMSchema","Business & People","Supplier {name}","Mobile","mobile"
"Supplier","CRMSchema","Business & People","Supplier {name}","Address","myAddress.addressBlock"
"Supplier","CRMSchema","Business & People","Supplier {name}","Name","name"
"Supplier","CRMSchema","Business & People","Supplier {name}","Phone","phone"
"NSSalesCode","GreenTreeSchema","Account Codes","AR Non-stock code {description}","Description","description"
"StockCodeAlias","GreenTreeSchema","","<Empty Display Format>","","myStockItem"
"Barcode","GreenTreeSchema","","<Empty Display Format>","","myStockItem"
"JCJob","CRMSchema","Job","Job {code}","{name}","Customer Name","myCustomer.name"
"JCJob","CRMSchema","Job","Job {code}","{name}","Description","name"
"JCEmployee","CRMSchema","Business & People","JC Employee {firstname} {surname}","{code}","First name","firstname"
"JCEmployee","CRMSchema","Business & People","JC Employee {firstname} {surname}","{code}","Surname","surname"
"SOSalesOrder","GreenTreeSchema","Documents","Sales Order {reference}","{myCustomer.name}","Customer order","customerOrderNumber"
"SOSalesOrder","GreenTreeSchema","Documents","Sales Order {reference}","{myCustomer.name}","Customer name","myCustomer.name"
```

- Reference:
- Type: New feature
- Release version: 2019.1.0

HR

Greentree Desktop - Issued Fixed in Release 2019.1.0

We've fixed these issues in Greentree Desktop:

Autoscan

- Autoscan barcodes that are generated for location transfers now include the barcode number when you print the barcode on the Location Transfer report.

Cash Management

- *Error 14079* no longer displays when a user tries to change the name of an imported transaction that became unmatched via the Automatic Bank Reconciliation process and after it was allocated to a general ledger account.

EDI

- If the **Allow negative on hand** option is selected for an item and back orders are allowed, an insufficient stock warning email is no longer sent when EDI tries to import a sales order with multiple lines for the same product. EDI now imports the sales order with the correct quantities of the item.

HR Payroll

- Employer Monthly Statement (EMS) files generated for New Zealand companies and payment summary annual report (EMPDUPE) files generated for Australian companies are no longer attached to the HR Module Control form. Greentree Desktop deletes files that were attached to the form when you apply the 2019.1.0 package.

Inventory

- We've fixed a problem where users couldn't change stocking levels if manually-closed purchase order receipts exist.
- The bottom of the **Transaction trees** and **Transaction fields** tables on the Stock Maintenance form are no longer cut off when you resize the form.

Print and Task Queue

- The Print and Task queue now runs tasks in the correct order.
- We've fixed an intermittent issue in which task queues didn't start when the database started.

Purchase Orders

- Clicking in the **Narration** text box on the Purchase Order Entry form no longer enables the **Save** icon on the toolbar if the text exceeds 93 characters.
- We've resolved an issue that prevents a user from creating purchase orders and supply chain management requisitions for permitted suppliers if the user's preferences only grant them **Team** access to the Supplier Maintenance form.
- Users can now create purchase orders for suppliers when Accounts Payable privileges are set to *Team*.

Sales Orders

- When the **Number** field on SO Order Entry form is set as *Read Only* in Windows Designer, you can no longer enter a sales order number by clearing the form.
- On the SO Release Backorders/Forward Order form, the *From* field for the **Inventory Code** is no longer reset to the value of the *To* field when you select only a *To* code or move off that field.

Workflow

- We've fixed a problem in the Workflow module where importing a QlikSense desktop returns *Error 1090*. The XML files for QlikSense desktop definitions that were exported in earlier Greentree versions are obsolete. Delete those XML files. After you apply the the Greentree Desktop 2019.1.0 pack, export the desktop definitions. You will be able to import the new XML files.
- We've added a plugin event, named *eventPreTablePopupMenu*, that enables custom schemas to not display popup

menus on clever tables and workflow panel tables. This event replaces the event named *eventGetCleverTableMenuNumber*, which we removed in this release.

Various Fixes

- The **Consolidations** tab no longer displays on the Company Maintenance form if the site is not licensed to use the Consolidations module.
 - We've fixed an issue with the Data Import Manager that only loaded a small number of lines for Advanced Price.
 - When logging in as the user *super*, the error message *Insufficient system manager licenses* no longer displays if all licenses are being used.
 - Importing an interface file, no matter how large or small, is now faster.
 - We've decreased the time it takes to generate accounts payable payment batches and HR direct credit schedules.
 - *Error 1090* no longer occurs when you edit or print tree-based Forms Manager reports using the New Report Writer.
 - We've fixed an issue where foreign currency quotes printed through the COM Interface were incorrect.
 - *Error 1310* no longer occurs when creating a new user or copying an existing user on the User Maintenance form.
 - When you select a user-defined field as a sort field in the New Report Writer, Greentree now saves the path to the report. Previously, the name of the user-defined field was saved, not the path to the report.
 - *Error 1000* no longer occurs when running an Approvals and Alert rule.
 - On the Interface Maintenance form, a deleted interface row no longer displays at the top of the **Lines** table when you re-open an interface file.
- Reference:
 - Type: Bug
 - Release version: 2019.1.0

Leave Planning

Greentree Desktop - Long Service Leave Changes (Australia)

The government of the state of Victoria in Australia has replaced its long service leave regulations with a new set of rules that took effect on 1 November, 2018. The key changes are:

- Employees can now take long service leave after completing *seven* years of continuous employment.
- Unpaid parental leave is now included when calculating the length of continuous employment.
- Employees can now take long service leave as one or more periods of leave, including taking single days off.
- Long service leave entitlements are now calculated based on the last period of continuous employment for employees whose hours of work have changed during the last 24 months. This is in addition to the existing formulas, which are calculated based on the last 12 months or the last five years.
- If an employee is rehired within 12 weeks of their employment ending, even if they resigned, that period now counts as continuous employment.

You need to change the Long Service Leave accrual rule to set the correct number of months from employee start dates for determining entitlement to long service leave. To do that:

1. Select **HR > System > Payroll > Accrual Rule Maintenance** or **HR > System > Leave Planning > Accrual Rule Maintenance**.
2. Select **Long Service Leave** from the **Name** list.
3. Click the rule that you want to modify. The Accrual Rule Level Maintenance form displays.
4. Click **Change**.
5. In the **Move to Next level** section change the value in the **After X months from start date** field.
6. Click **OK**.
7. Click the **Save** icon on the Accrual Rule Maintenance form.

You can learn more about Victoria's new long service leave rules at the [Business Victoria website](#).

- Reference:
- Type: Enhancement

- Release version: 2019.1.0

Payroll

Greentree Desktop - Accrued Annual Leave Calculations for Employees Taking Leave Without Pay

Greentree Desktop now calculates an employee's accrued annual leave if the employee:

- Opts to take more than one week of leave without pay, or
- Agrees to change the anniversary date that determines their entitlement to annual leave. The employee receives their annual leave entitlement at a later date in subsequent years.

The changes for leave without pay only apply to leave that an employee is *accruing* but is not yet entitled to. The changes *do not* include or apply to sick leave.

Note: For more information about leave without pay, visit the [Employment New Zealand website](#) and the [business.govt.nz website](#).

To support leave without pay calculations, we've made:

- [Changes to the HR Employee Maintenance Form](#)
- [Changes to Event Types](#)

Changes to the HR Employee Maintenance Form

To support the changes to the way in which Greentree handles leave without pay, we've added the **Leave Without Pay** button and the **Next Anniversary** field to the **Defaults** tab of the HR Employee Maintenance form. Greentree updates this field when you set the dates over which employees take leave without pay.

The screenshot shows the 'HR Employee Maintenance' window. At the top, there are search fields for Code (ROSEB), Surname (Rose), and First Name (Beth). Below these are tabs for various employee categories: CV, Involvement, Medical, Org Chart, Development, Key Dates, Events, Security, Custom, and Notes. Under the 'Key Dates' tab, there are sub-tabs: Main, Defaults, Options, Tax Config, Payroll, Balance Tracking, Other, Transactions, Positions, and Functions. The 'Main' sub-tab is active, showing fields for Type (Permanent), Basis (Full Time), Start Date (07/05/07), Next Anniversary (07/05/19), Termination Date, and checkboxes for 'Inactive for Payroll' and 'Temporarily Suspended'. On the right side, there is a vertical sidebar with buttons: Attachments, Pay Now, Process Accruals, Terminate, Re-activate, eHR Configuration, Leave Forecast, and Leave Without Pay (highlighted in red). At the bottom right of the sidebar is a 'Verified' button with a checkmark.

The **Next Anniversary** is the date on which the employee becomes entitled to accrued annual leave.

After you've done that, click the **Leave Without Pay** button. The Leave Dates form opens.

The 'Leave Dates' dialog box has a purple header with the 'GT' logo and the title 'Leave Dates'. It contains two date pickers: 'Start' and 'End', both highlighted with a red border. Below them is a text instruction: 'The New Anniversary date is based on the total period of leave entered less one week'. There are three more date pickers: 'Current Anniversary Date' (showing 31/01/2020), 'New Anniversary Date', and a 'Verified' checkbox. At the bottom are 'OK' and 'Cancel' buttons.

Enter the **Start** and **End** dates for the employee's leave. Greentree Desktop uses the dates to calculate the employee's next anniversary date, based on the period of leave taken in excess of one week.

For example, if the employee's current anniversary date is 16 June 2019 and the employee takes leave from 13 May 2019 to 11 of June 2019. Based on that, the employee's new anniversary date is 9 July 2019. The employee does not accrue annual leave for the period of leave that is in excess of one week.

Click **OK**. The **Next Anniversary Date** on the HR Employee Maintenance form updates with the new anniversary date.

Notes:

- The start date can't have an accrual already created for it. If it does, Greentree Desktop does not allow the change to the anniversary date.
- The **Next Anniversary** date only affects the processing of leave accruals.

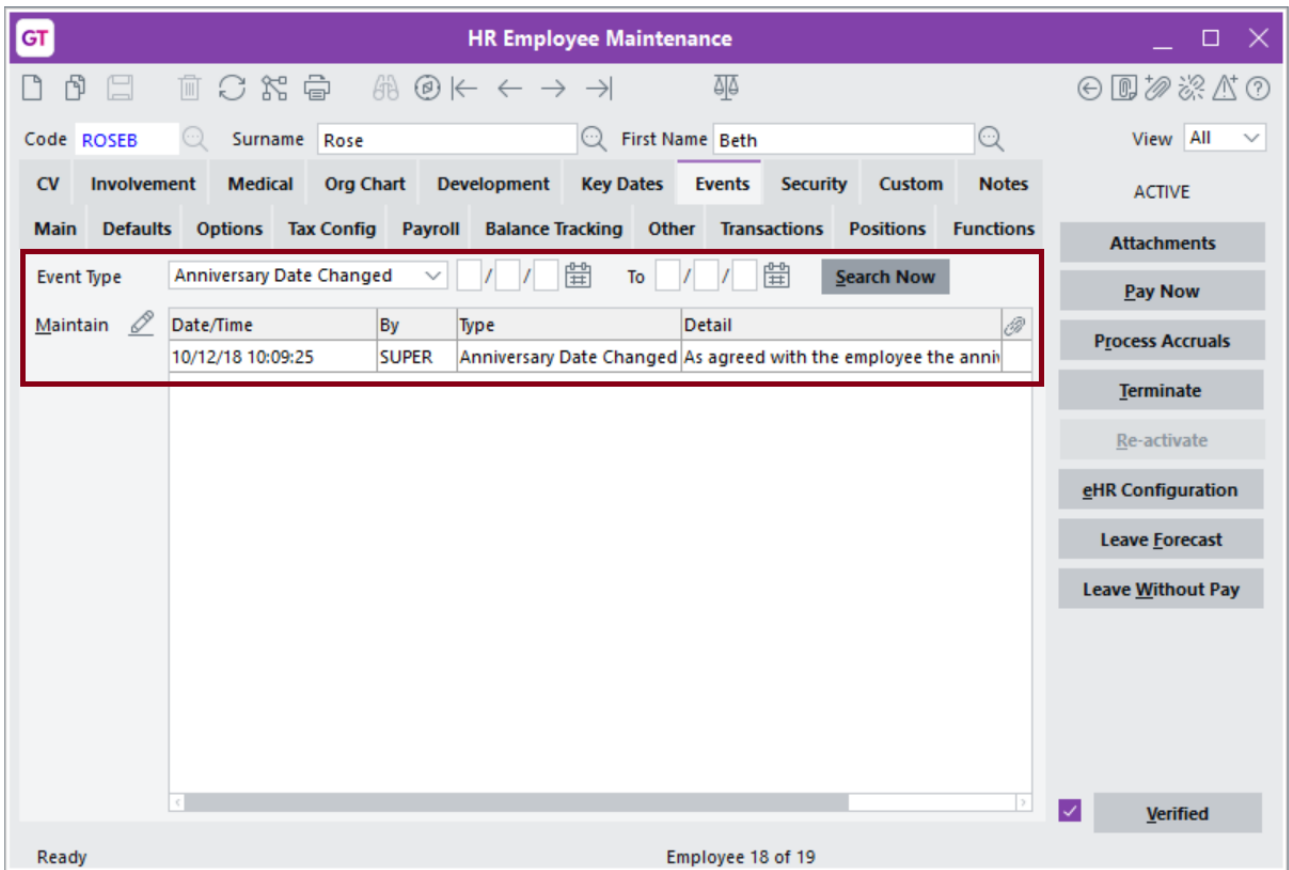
Changing the Next Anniversary Date on the Employee Maintenance Form

You can change the **Next Anniversary Date** on the Employee Maintenance form. If the employee has *advanced accruals* already created, and those accruals are the only accruals preventing the change, a warning message displays. The message lists the transaction types and accruals.

Click **OK** on the message to change the next anniversary date. Otherwise, click **Cancel**. You don't need to delete the accruals.

Changes to Event Types

We've added a new employee event type called *Anniversary Date Changed*, which you can view on the **Events** tab of the HR Employee Maintenance form:



To review the event's details, select **Anniversary Date Changed** from the **Event Type** list and click **Search Now**. Double click an entry in the table to display the Event Maintenance form:

Event Maintenance	
Employee	Rose, Beth
Date/Time	10/12/18 10:09:25
User	SUPER
Type	Anniversary Date Changed
Detail	As agreed with the employee the anniversary date has been changed from 07 May 2019 --> 30 May 2019. Leave has been taken between 03 January 2019 and 01 February 2019
Read Only: Auto Generated Event	

The information on the form is read only.

The HR Masterfile Audit report has also been modified to add and track changes to employee Next Anniversary dates.

Validation of Employees

When you apply the 2019.1.0 package to your system, the Packman utility ensures that all employees have a start date. If an employee doesn't have a start date, application of the package fails and Packman displays the employee's details.

You must set a start date for the employee, then apply the 2019.1.0 package.

- Reference:
- Type: New feature
- Release version: 2019.1.0

Greentree Desktop - Support for Payday Filing (New Zealand)

MYOB Greentree now supports Payday filing, an Inland Revenue Department (IRD) payroll reporting initiative that becomes mandatory on 1 April 2019. With Payday filing, employers send employment information schedules to the IRD when they pay their employees.

Payday filing is currently voluntary. Before 1 April 2019, you can [opt into Payday filing](#) through your myIR account. If you successfully opted in, the **Payroll returns** account is available in the **My business** section of your myIR account.

In this release of Greentree Desktop, you cannot send Payday filing information to the IRD from within the application. Instead, you create a CSV file containing the information, which you upload using the myIR portal.

For more information about Payday filing, visit the [IRD website](#).

Setting Up Greentree Desktop for Payday Filing

You configure Greentree Desktop for Payday filing by:

- [Activating Payday Filing](#)

- [Setting HR System Options](#)

Activating Payday Filing

To activate Payday filing in Greentree Desktop:

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

The screenshot shows the 'HR Module Control' window with the 'Payroll' tab selected. Under the 'Payroll' tab, the 'Lodgement' sub-tab is active. A red box highlights the 'Lodge pays via Payday from' field, which contains a date picker (MM/DD/YYYY) and a calendar icon. Below this field is a checkbox labeled 'This company's Payday data is lodged by a registered agent'.

3. Set these options:

- **Lodge pays via Payday from** - The date from which you will start reporting payroll using Payday filing. Payments made *before* this date aren't included in payday filings.

Note: You cannot set this date prior to *01/04/2018*.

Payday filing starts from the beginning of the month as the employer monthly schedule (EMS) it replaces is filed monthly. The last EMS that you filed reports to the end of a month.

- **This company's Payday data is lodged by a registered agent** - Select this option if you're a site that acts as a registered tax agent for your clients.

If you select this option, you must enter your registered agent details on the **Payday** tab under **HR > System > System Options**. [See below](#) for more information.

4. Click **Save**.
After you click **Save**, you can't change the date from which you start reporting payroll using Payday filing.
5. Log out of Greentree Desktop and then log back in to see the **Lodgements** option under the **HR > Payroll** menu.

Activating Payday filing also enables two payday interface files that default on the **Other** tab of the Inland Revenue Reporting Configuration form.

Setting HR System Options

If you're a site that acts as a [registered tax agent](#) for your clients, you must configure Greentree Desktop to include your agent information in payday filings. To do that:

1. Select **HR > System > System Options**.
2. Click the **Payday** tab.
3. Select the **Lodge Payday data as a registered agent** option.

4. Enter this information:

? **Registered agent IRD number** - Your organisation's agent number, issued by the IRD.

? **Contact Name** - The name of the person in your organisation who the IRD can reach if there's a problem or if the

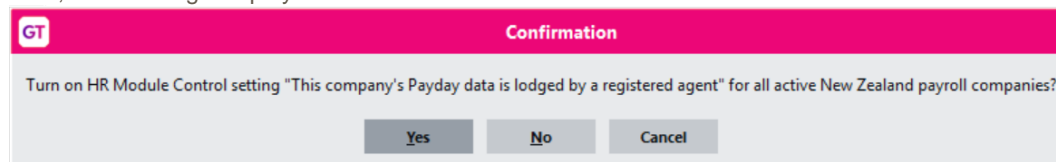
IRD needs more information.

? **Phone** - The contact person's telephone number.

? **Email** - The contact person's email address. This can be up to 200 characters.

5. Click **Save**.

If you didn't select the **This company's Payday data is lodged by a registered agent** on the HR Module Control form, this message displays:



6. Click **Yes**.

Checking Employee Information Fields for Invalid Characters

The IRD validates all upload files. If the file contains invalid characters, the IRD rejects the file. You must ensure that the **Usual Name**, **Address**, and **Email** fields on the Employee Maintenance form *do not* contain these characters:

- Square brackets ([and])
- Backslashes (\)
- Double quotes (")
- Embedded commas

If the **Usual Name** and **Address** fields contain any of those characters, Greentree Desktop strips them out and leaves a space in their place when generating the upload file.

Employee email addresses can only contain these characters:

- A-Z
- a-z
- 0-9
- @
- -
- _

Greentree Desktop cannot strip out illegal characters because that will make email addresses invalid.

Note About Employee Pay

The IRD rejects any upload file containing negative pay values; the IRD site only accepts files containing positive integers. If you need to adjust an employee's record, the net result that's saved to the upload file must be positive. If the net result is negative, you must manually adjust it before uploading the file to the IRD.

Processing a Pay Run

Now that you're set up to do Payday filing, you can process a pay run for:

- [Your employees](#)
- [Suppliers](#)

Processing Pay for Your Employees

To do that:

1. [Create a payment](#) in Greentree Desktop.

2. Either click **Create Lodgement** on the Create Payments form or select **HR > Payroll > Lodgements**.

The Payday Lodgement form displays.

3. Select the **Payment Date** for which you want to do a payday filing.
4. You can also filter based on a **Pay Group** or a **Branch**.
5. These options are available in the **Action** list:
 - **Create Return** - Greentree selects this option if this is the first time that you're filing for the selected payment date.
 - **Create Amendment** - Greentree selects this option if you have lodged payroll information for the selected payment date and need to make a change to that information.
 - **Recreate Return** - Select this option if the original lodgement file was lost or if it contained incorrect data and you had to fix it before resubmitting the lodgement.
 - **Recreate Amendment** - Select this option if the original amendment file was lost or if it contained incorrect data and you had to fix it before resubmitting the amendment.

6. You can use the default file name in the **File** field or you can enter a descriptive name for the file that you'll upload to the IRD.

To set the folder where Greentree Desktop saves the payday file, click the ... icon to the right of the field, navigate to the folder, and click **Save**.

Note: Click **Save file path** to use the folder you chose as the default location to save all payday files that you create.

7. Greentree Desktop selects the correct **Interface** file based on the action you chose.

You don't need to select another interface from the **Interface** dropdown list unless, for example, you use branches to represent employers and need to use customised interface definitions that hard code IRD numbers.

8. Click **Create**.
Greentree Desktop creates a CSV file and saves it to the folder you specified in step 6.

Next, [upload the CSV file](#) to the IRD.

Processing Pay for Suppliers

Note: In release 2019.1.0, Greentree Desktop only supports paying suppliers twice monthly.

To process pay for suppliers:

1. [Create a payment](#) in Greentree Desktop.
2. Either click **Create Lodgement** on the Create Payments form or select **HR > Payroll > Lodgements**.

The Payday Lodgement form displays.

3. Click the **Suppliers** option.

The screenshot shows the 'Payday Lodgement' window. At the top right, it states 'No return has been generated for this date.' The 'Payee type' section has 'Suppliers' selected. The 'Select Suppliers' section has 'From Payment Date' set to 16/12/18 and 'To Payment Date' set to 31/12/18. A table with columns 'IRD Number', 'Code', 'Name', 'Net', 'WH Tax', 'Return Generated', 'Amendment Generated', and 'Action Required' is visible. The 'Action' dropdown is set to 'Create Return', with 'Nil return' selected. The 'Interface' dropdown is set to 'El return post 1/04/2018'. The 'File' field contains '2018 12 31 Suppliers return nil.csv'. There are 'Create' and 'Close' buttons at the bottom right.

4. Enter the first or last date of the period for which you're paying suppliers in the **From Payment Date** or **To Payment Date** fields.
Greentree only supports paying suppliers twice per month. Greentree Desktop determines the first or last date, depending on which field you complete.
5. These options are available in the **Action** list:
 - **Create Return** - Greentree selects this option if this is the first time that you're filing for the selected payment date.
 - **Create Amendment** - Greentree selects this option if you have lodged payroll information for the selected payment date and need to make a change to that information.
 - **Recreate Return** - Select this option if the original lodgement file was lost or if it contained incorrect data and you had to fix it before resubmitting the lodgement.
 - **Recreate Amendment** - Select this option if the original amendment file was lost or if it contained incorrect data and you had to fix it before resubmitting the amendment.
6. You can use the default file name in the **File** field or you can enter a descriptive name for the file that you'll upload to the IRD.

To set the folder where Greentree Desktop saves the payday file, click the ... icon to the right of the field, navigate to the folder, and click **Save**.

Note: Click **Save file path** to use the folder you chose as the default location to save all payday files that you create.

7. Greentree Desktop selects the correct **Interface** file based on the action you chose.

You don't need to select another interface from the **Interface** dropdown list unless, for example, you use branches to represent employers and need to use customised interface definitions that hard code IRD numbers.

- Click **Create**.
Greentree Desktop creates a CSV file and saves it to the folder you specified in step 6.

Next, [upload the CSV file](#) to the IRD.

Uploading the Payroll File to the IRD

In this release of Greentree Desktop, you must upload the CSV file containing payday information to the IRD. To do that:

- [Log into myIR](#).
- Access your **Payroll returns** account on the **My business** tab.
- Click either the **File return** link or the **File transfer** link.
- Click the **Browse** button, and then find the CSV file you created.
- Click **Open**.

Caution: If your site uploads the same file twice, the IRD rejects the second file as a duplicate. However, if the two files are not identical and:

- The same employee is included in both files (because, for example, they were added using filters), **and**
- Both have the same pay period

Then the IRD adds the pay values for both.

Amending a Lodgement

If there is an error in your original lodgement or if it's missing information, you can file an amendment with the IRD. The amendment includes information for employees whose records have been changed or which include new information. For example, if you cancel a payment on the Create Payments form, you'll need to amend the lodgement for that payment.

The file that Greentree generates includes a line for the original filing (prefixed with *DTI*) and the amended line (prefixed with *DAI*).

Here's an example:

```
EIA,22666207,20190108,48130011,Harry Styles,031234567,0001
DTI,071365638,Clark Craig,M SL,,20180319,20180325,WK,54370,0,0,8385,0,,6516,0,0,150,0,0
DAI,071365638,Clark Craig,M SL,,20180319,20190113,WK,54370,0,0,8385,0,,6516,0,0,150,0,0
DTI,071365638,Clark Craig,SLBOR,,20180319,20180325,WK,0,0,0,0,,2000,0,0,0,0,0
DAI,071365638,Clark Craig,SLBOR,,20180319,20190113,WK,0,0,0,0,,2000,0,0,0,0,0
DTI,071365638,Clark Craig,SLCIR,,20180319,20180325,WK,0,0,0,0,,2715,0,0,0,0,0
DAI,071365638,Clark Craig,SLCIR,,20180319,20190113,WK,0,0,0,0,,2715,0,0,0,0,0
```

To amend a lodgement:

- Select **HR > Payroll > Lodgement**. The Payday Lodgement form displays.
- Select the **Payment Date** for which you want to create an amendment.
Employees who require an amended filing for that payment date are highlighted on the form:

Note: The **Create Amendment** option on the form is automatically selected.

- You can use the default file name in the **File** field or you can enter a descriptive name for the file to upload to the IRD.
- Click **Create** to generate the CSV file containing the updated payday information.
- Follow the [instructions for uploading](#) a payday information file to the IRD.

Creating a Nil Return

You can optionally file a nil return with the IRD if you stop employing staff (whether temporarily or permanently) but are either still in business or keeping your company dormant.

To create a nil return:

1. Select **HR > Payroll > Lodgement**. The Payday Lodgement form displays.
2. Select the **Payment Date** for which you want to file a nil return.
3. Click the **Nil return** option.
4. You can use the default file name in the **File** field or you can enter a descriptive name for the file that you'll upload to the IRD.
5. Click **Create**.
6. Follow the [instructions for uploading](#) a payday information file to the IRD.

Create a Withholding Tax File

If you're not using Greentree's payroll module, you still might need to create and file a payday return for suppliers. Use the Create Withholding Tax File form to generate a CSV file, which you can upload to the IRD using the myIR portal.

To create a withholding tax file:

1. Go to **Process > Accounts Payable > Create Withholding Tax File**.

2. Choose **Payday Scheduling Payments Interface** from the **Interface type** list.
3. Set the date range for which you want to generate the upload file in the **Tax return period from** and **To** fields.
4. Optionally, change the name of the **Output file**.

You can also choose the path to which to save file, and the click **Save file path** to use that path in future.

5. Click **Create**.

Here's an example of the file that Greentree Desktop generates:

```
HEI,22666207,20181130,N,N,,Bill Acton,(00) 000 000,,2,12450,0,0,0,0,12450,0,0,65024,65024,MYOB Greentree 2018.3-1,0001
DEI,111111111,Askey Computer Compo,WT,,,20181116,20181130,AH,11111,11111,0,1667,0,,0,0,0,0,0
DEI,48125360,Computer and Parts M,WT,,,20181116,20181130,AH,53913,53913,0,10783,0,,0,0,0,0,0
```

Next, upload the file to the IRD.

Creating a New and Departing Employees File

Employers must report all new and departing employee details to the IRD no later than the next time they file employment information. For sites that don't use the Greentree HR module, we've added the New and Departing Employees form. Use that form to generate the file to upload to the IRD.

Note: The New and Departing Employees file requires postal addresses to be provided with *three-character* country codes. We've added a field to Greentree Desktop to hold [ISO 3166-1 alpha-3 country codes](#). When sites are upgraded, the new field is populated with the correct three-character codes if a country uses two-character codes. You can view or change the codes on the Country Maintenance form.

To create the new and departing employees file:

1. Select **HR > Payroll > Other Functions > New and Departing Employees File**. The New and Departing Employees form displays.

2. Optionally, select:
 - The **From Date** and the **To** date for which you want to report details of new and departing employees.
 - A **Pay Group** and/or a **Branch**.
3. Greentree automatically selects the **New and Departing Employees CSV post 1/04/2018** from the **Interface** list. This interface is in the format specified in the IRD's 2018-2019 final specification.
4. Optionally, change the name of the output file. You can also choose the path to which to save file, and click **Save file path** to use that path in future.
5. Click **Create**.

Here's an example of a new and departed employees file:

```
HED,22666207,MYOB Greentree 2018.3-4,3
DED,48130011,Durham Nancy, Miss, Nancy, ,Durham,20010601,20181103,,Contributions holiday,,,,000 000 0000,,,,00 000 0000,,NZ,,,,PO
Box 12354 Acacia Township Address Line 3 Postal Acacia Bay,Taupo,3331,
TED,M
DED,48130054,Wiggins Marlene,Mrs,Marlene,,Wiggins,19980215,20181110,20181130,Opted out,marlene.wiggins@myob.com,,,64 027
654987,,,,64 09 3654987,,NZ,,,,99 High Street Fernside,Waimakariri,7400,
TED,M
DED,48130028,Guthrie Peter,Mr,Peter,,Guthrie,19770516,20181105,,Non-member,peter.guthrie@myob.com,,,027 326 4567,,,,03 132
4567,,NZ,,,,Flat 1 8976 Colombo Street Edgeware,Christchurch,8013,
TED,M SL
```

Creating a Final Return

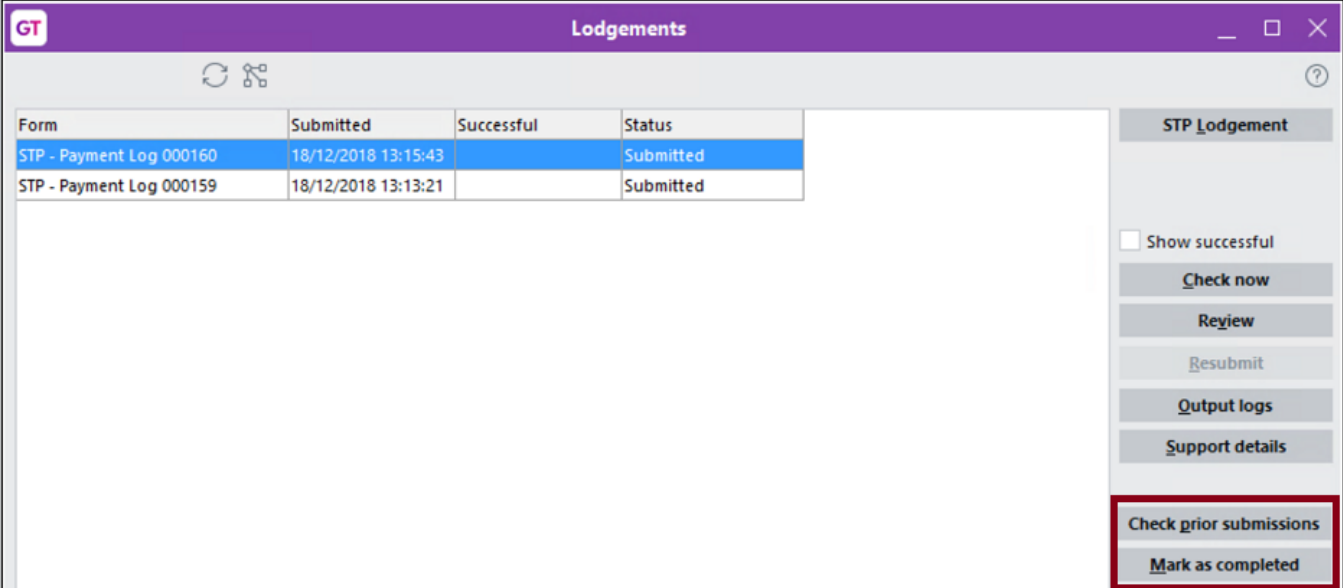
A final return is the last tax return you'll submit to the IRD. Ever. You'd generally file a final return if [you wind up your business](#).

To create the final return:

1. Select **HR > Payroll > Lodgement**. The Payday Lodgement form displays.
2. Select the **Payment Date** for which you want to submit the final return.
3. Click **Final return**.
4. You can use the default file name in the **File** field or you can enter a descriptive name for the file that you'll upload to the IRD.
5. Click **Create**.
6. Follow the [instructions for uploading](#) a payday information file to the IRD.
 - Reference:
 - Type: New feature
 - Release version: 2019.1.0

Greentree Desktop - Enhancements to the STP Lodgements Form

We've added a two buttons to the Lodgements form:



Form	Submitted	Successful	Status
STP - Payment Log 000160	18/12/2018 13:15:43		Submitted
STP - Payment Log 000159	18/12/2018 13:13:21		Submitted

STP Lodgement

Show successful

[Check now](#)

[Review](#)

[Resubmit](#)

[Output logs](#)

[Support details](#)

[Check prior submissions](#)

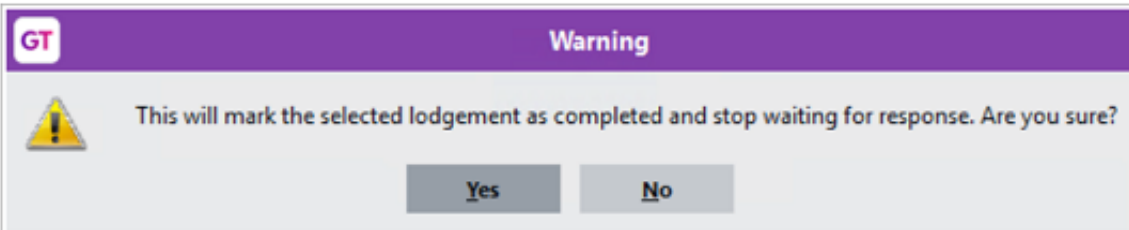
[Mark as completed](#)

Click the **Check prior submissions** button determine the status of STP lodgements that were submitted multiple times because, for example:


- Greentree Desktop received an incorrect error from the ATO and the user was allowed to resubmit the lodgement when they shouldn't have been able to.
- The user double clicked on the **Submit** button when Greentree was processing the lodgement.

When you click the **Check prior submissions** button, Greentree Desktop retrieves the IDs of previously-submitted STP lodgements and tries to get their status from the ATO. If any lodgement has received a response ? whether success or failure ? it's considered completed. The **Status** column for that lodgement in the table on the Lodgements form displays **Done**.

Sometimes, an STP lodgement is lost or never reaches the ATO. If a lodgement has been lost, you can select it on Lodgements form and then click the **Mark as Completed** button. A warning displays:



Warning

 This will mark the selected lodgement as completed and stop waiting for response. Are you sure?

[Yes](#) [No](#)

Click **OK**. A form displays, asking for a reason to mark the lodgement as complete.

Enter a reason, and then click **OK**. Greentree Desktop records the lodgement as successful. The lodgement displays as **Completed** in the table on the Lodgements form.

If you accidentally mark a lodgement as complete on the Lodgements form, you can undo that by clicking the **Show successful** option. Then, select the lodgement and click **Mark as uncompleted**.

- Reference:
- Type: Enhancement
- Release version: 2019.1.0

Report Writer

Greentree Desktop - Properties to Identify Line Item Changes

We've added new properties to line items to identify when and by whom they were created or modified. The properties enable you to keep better track of changes to line items, to better audit any changes, and to make reporting with external tools like QlikView easier.

The new properties are:

- **entryUser** - The login name of the user who created the line item.
- **entryTimestamp** - The date and time on which the user created the line item ? for example, *10 January 2019, 11:36:26*.
- **modifiedUser** - The login name of the user who changed the line item.
- **modifiedTimestamp** - The date and time on which the user modified the line item. This has the same format as the entryTimestamp property.

The properties do not appear on any of Greentree Desktop's forms. You can view the new properties in:

- JADE Query
- Inspector
- Report Writer
- Reference:
- Type: Enhancement
- Release version: 2019.1.0

WebView

WebView - Issues Fixed in Release 2019.1.0

We've fixed these issues in WebView:

- When you run a WebView GL Transaction Listing in the browser, exporting the output no longer causes a 404 error.
- *Error 1090* no longer displays when you run the system script *Cleanup Published Reports*.
- On the Financial Reporting - Live form, selecting **Output to XML** now correctly formats the **Percentage** column in **Total** rows.
- *Error 1090 - Attempted access via null object reference* no longer displays when you add attachments to a service request from the Documents Library.
- We've resolved a layout issue on the Published Report Properties form that caused the **Account Group** label to overlap with the **Account Group** combo box.
- *Error 1090 ? Attempted access via null object reference* no longer displays when you try to run financial reports if you do not have a license for the Workflow module.
- The message *An error has occurred (1035 String too long)* no longer displays when you enter a range exceeding 30 characters in the **Calc / Branch / Account / Type** column on the Row Maintenance form. You can now enter up to 65 characters in that column.
- We've resolved:
 - A display issue that forced rounding and displayed the last two of four digits as zero.
 - A formatting issue that displayed the percentage column as a number, and not as a percentage.
- Reference:
- Type: Bug
- Release version: 2019.1.0

Autoscan

Greentree Desktop - Enable 64-bit Version of Autoscan

Autoscan tasks now run on the same database node as other 64-bit tasks. For sites that use Autoscan but do not use other 32-bit tasks, Greentree no longer creates a 32-bit node.

- Reference:
- Type: Enhancement
- Release version: 2019.1.0

Browser Approvals

Greentree Browser - Expanded Search Field Droplist on Timesheet Entry Form

We've expanded the **Code** field in the **Job** droplist on the Timesheet Entry form. You can now enter 20 characters in that field. Previously, you could only enter nine characters.

Note: You can only enter up to nine characters in the **Code** fields in other droplists on the Time Entry form.

- Reference:
- Type: Enhancement
- Release version: 2019.1.0

Greentree Browser - Issues Fixed in Release 2019.1.0

We've fixed these issues in Greentree Browser:

- The error message *You do not have permissions to perform this operation on a Leave Request* no longer displays

- when an approver tries to approve a leave request without a team or user assigned to that request.
- The main Leave Requests form no longer closes when you select a customised leave request form.
- Reference:
- Type: Bug
- Release version: 2019.1.0

Browser Licensing

Greentree Browser - New Column on the Timesheet Review Form

We've added the **PR Tran Type** column to the table on the Timesheet Review form. This is a display-only column that includes the transaction type for an employee's timesheet.

The screenshot shows the 'Timesheet Review' interface. At the top right, there are window control icons and an 'Approve Selections' button with a gear icon. Below the title, there are tabs for 'Approve Timesheets' and 'Missing Timesheet'. A 'RECORDS FOUND 27' indicator and a 'Filter' button are present above the table. The table has the following columns: Approve, Week Ending, Employee, Narration, Date, Approver, Hours, Company, Job, Activity, Work Centre, and PR Tran Type. The 'PR Tran Type' column is highlighted with a red border. The table contains 10 rows of data, each representing a timesheet entry with various details like dates, hours, and activity codes.

Approve	Week Ending	Employee	Narration	Date	Approver	Hours	Company	Job	Activity	Work Centre	PR Tran Type
<input type="checkbox"/>	11/01/2019	User JCPR ...		10/01/2019	Amanda Alg...	8.00	Greentree4 ...	System for ...	Administrati...	Administrati...	Ordinary Ho...
<input type="checkbox"/>	11/01/2019	User JCPR ...		11/01/2019	Amanda Alg...	8.00	01 Greentree4 ...	5000 System for ...	ADMIN Administrati...	ADMIN Administrati...	220 Ordinary Ho...
<input type="checkbox"/>	18/01/2019	User JCPR ...			Amanda Alg...	35.00					
<input type="checkbox"/>	18/01/2019	User JCPR ...		14/01/2019	Amanda Alg...	7.00	01 Greentree4 ...	5002 Internet Co...	ADMIN Administrati...	ADMIN Administrati...	22001 Ordinary Ho...
<input type="checkbox"/>	18/01/2019	User JCPR ...		15/01/2019	Amanda Alg...	7.00	01 Greentree4 ...	5002 Internet Co...	ADMIN Administrati...	ADMIN Administrati...	22001 Ordinary Ho...
<input type="checkbox"/>	18/01/2019	User JCPR ...		16/01/2019	Amanda Alg...	7.00	01 Greentree4 ...	5002 Internet Co...	ADMIN Administrati...	ADMIN Administrati...	22001 Ordinary Ho...
<input type="checkbox"/>	18/01/2019	User JCPR ...		17/01/2019	Amanda Alg...	7.00	01 Greentree4 ...	5002 Internet Co...	ADMIN Administrati...	ADMIN Administrati...	22001 Ordinary Ho...
<input type="checkbox"/>	18/01/2019	User JCPR ...		18/01/2019	Amanda Alg...	7.00	01 Greentree4 ...	5002 Internet Co...	ADMIN Administrati...	ADMIN Administrati...	22001 Ordinary Ho...

- Reference:
- Type: Enhancement
- Release version: 2019.1.0