

# MYOB Greentree

Release Notes

2020.5.0



# Contents

Introduction	1
New Features	2
eDocs – Support for Sales Orders .....	2
Setting up eDocs for Sales Orders.....	2
Creating eDoc Sales Orders .....	12
Creating a Sales Order .....	17
Reviewing Customer Transactions .....	18
Update to eDoc AP Invoices .....	18
Desktop – Ordinary Weekly Pay .....	19
Setting Ordinary Weekly Pay Methods.....	19
Employee Balances .....	21
Desktop – Sick Leave in Days.....	22
Changes to Setup Options.....	22
Updating Employees.....	24
Effects on Pay Entry.....	26
Reporting on Sick Leave in Days .....	26
Making Sick Leave Requests .....	27
Desktop – ADP and OWP Features.....	28
Update to .NET Framework Version .....	28
Resolved Issues	29
Greentree Desktop .....	29
Greentree Browser.....	29

# Introduction

In release 2020.5.0, we've added support for Sales Orders to eDocs. This helps to optimise the sales order process by increasing business efficiency, providing more control over operational cost and delivering time and productivity benefits.

The 2020.5.0 release continues our work to improve leave management for NZ companies, and fixes bugs identified in previous versions.

# New Features

## eDocs – Support for Sales Orders

This release adds support for sales orders to eDocs. You can now import a customer's purchase order document as an eDoc Sales Order from an email address or file location, as with other eDoc types (e.g. AP Invoices).

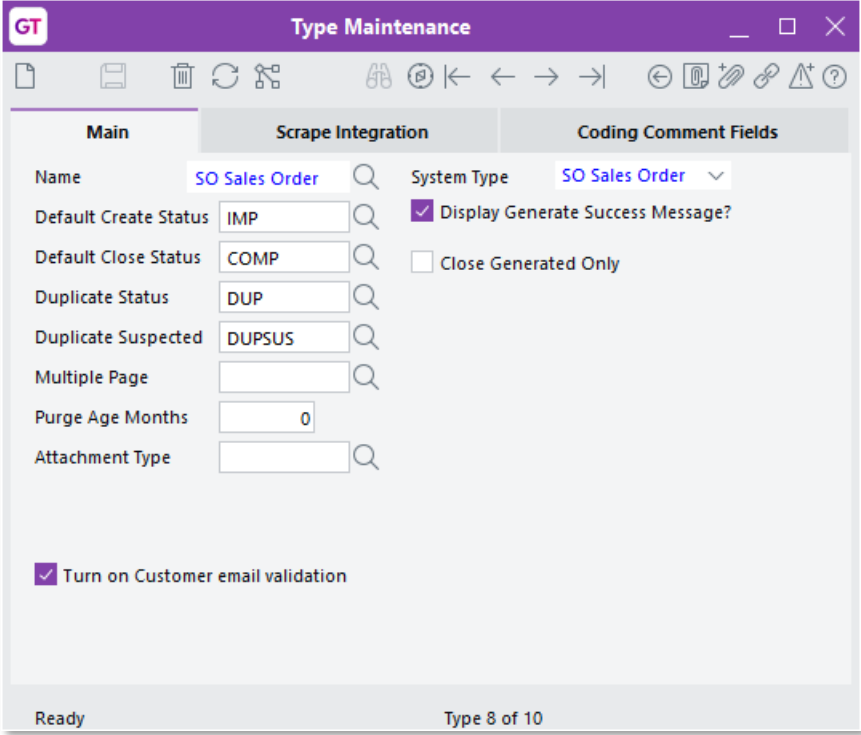
Header information for the eDoc Sales Order can be entered manually by the user, or scraped and then checked and updated where required. Similarly, line details can be manually entered by the user or scraped and auto-matched, as with eDoc AP Invoices. You can also set up line mapping for each customer, to allow auto-matching of scraped lines.

### Setting up eDocs for Sales Orders

We've updated configuration options on several new and existing screens to capture all of the setup options needed for eDoc Sales Orders.

#### Type Maintenance

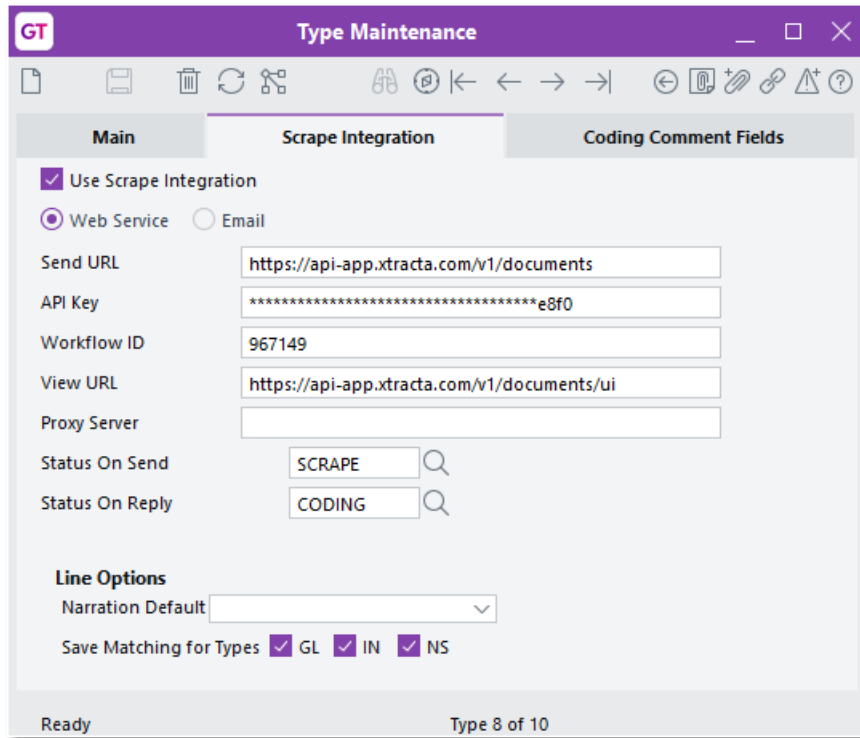
We've added a new system type for Sales Orders—select the "SO Sales Order" type on the Type Maintenance window to configure it:



The screenshot shows the 'Type Maintenance' window with the 'Main' tab selected. The 'Name' field is set to 'SO Sales Order' and the 'System Type' dropdown is also set to 'SO Sales Order'. Other fields include 'Default Create Status' (IMP), 'Default Close Status' (COMP), 'Duplicate Status' (DUP), 'Duplicate Suspected' (DUPSUS), 'Multiple Page' (empty), 'Purge Age Months' (0), and 'Attachment Type' (empty). There are checkboxes for 'Display Generate Success Message?' (checked) and 'Close Generated Only' (unchecked). At the bottom, there is a checkbox for 'Turn on Customer email validation' which is checked. The status bar at the bottom indicates 'Ready' and 'Type 8 of 10'.

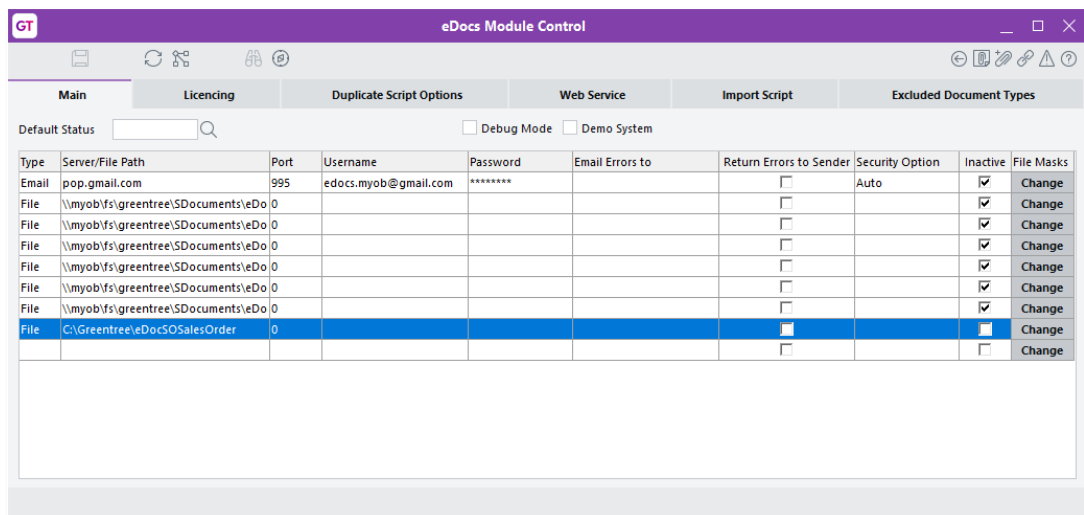
For the SO Sales Order type, the Main tab includes a **Turn on Customer email validation** option—this works in the same way as the **Turn on Supplier email validation** option for AP Invoices.

If you are registered for scraping, a Scrape Integration tab is available for the SO Sales Order type, so you can set up scraping for eDoc Sales Orders in the same way that you would with other types:

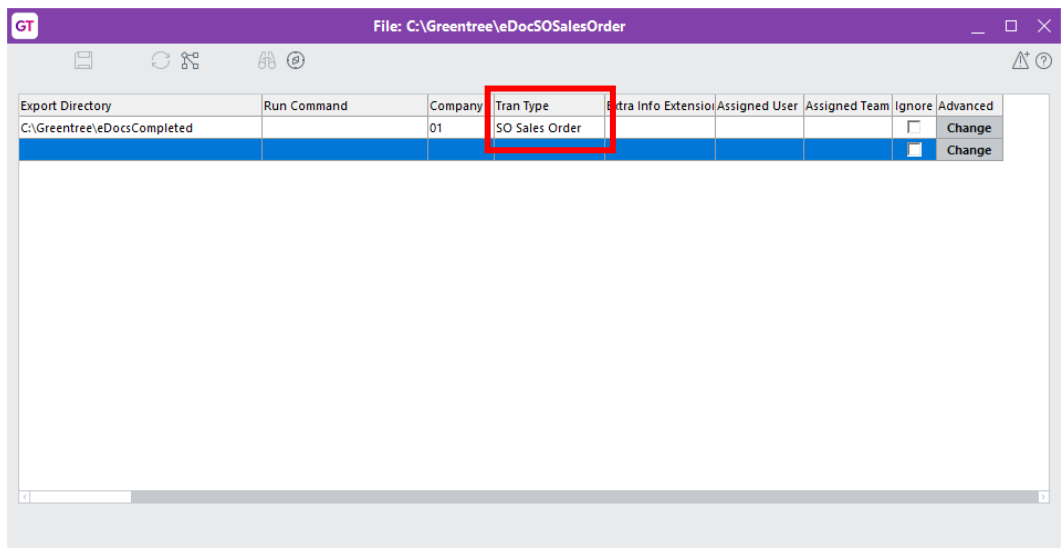


## Module Control

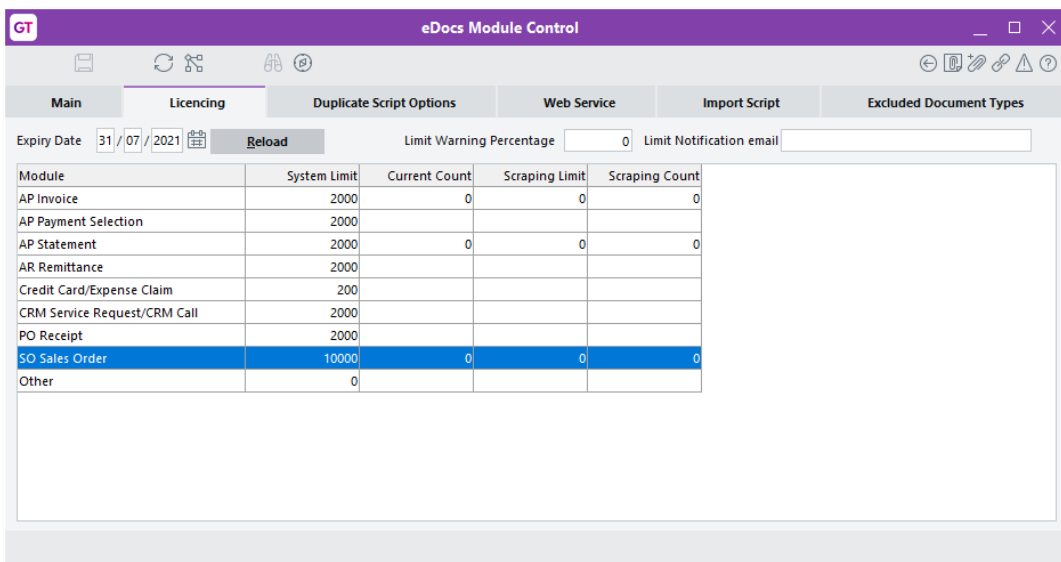
Setup options for Sales Orders can be entered on the eDocs Module Control window. You can enter a new line for Sales Orders on the main tab, selecting whether documents will be imported from an email address or a file location:



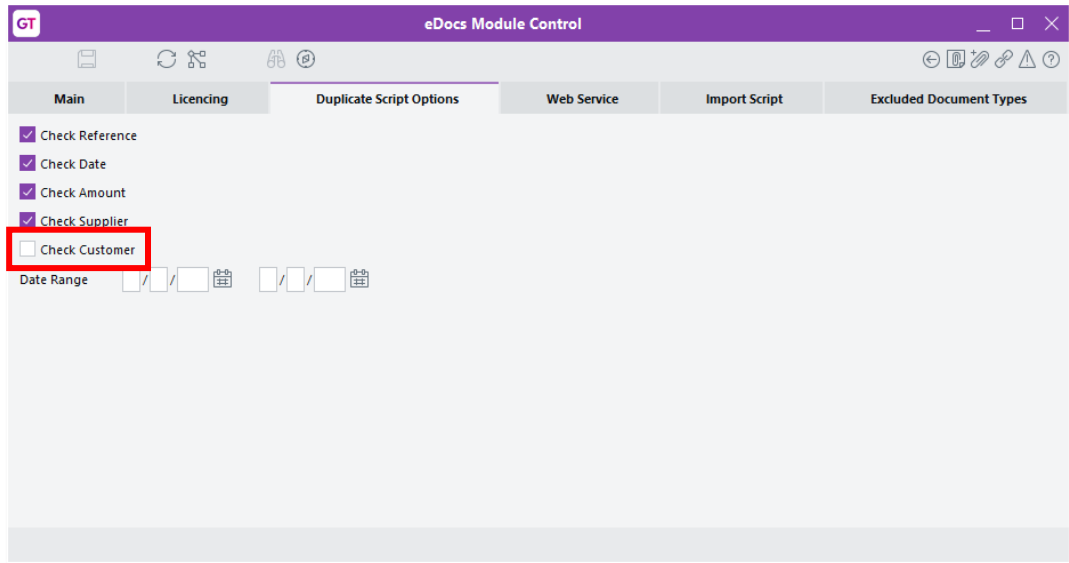
When editing the details of a line, you can select the “SO Sales Order” transaction type from the dropdown in the Tran Type column:



The Licencing tab shows the document limits that your site is licenced for and the current count of documents processed:

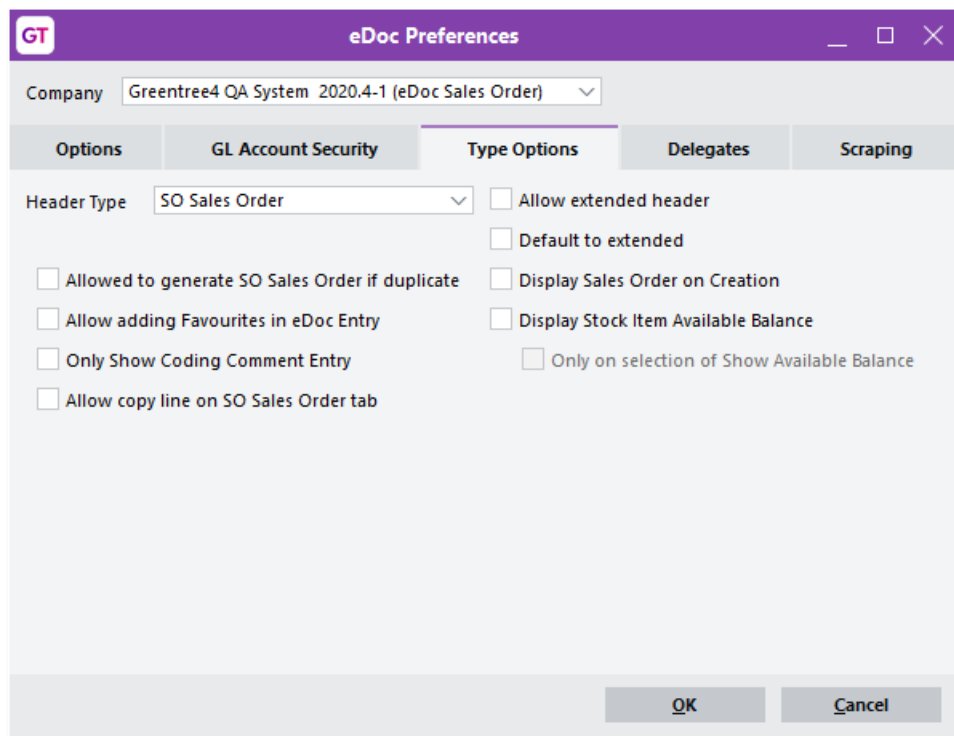


A new **Check Customer** option has been added to the Duplicate Script Options tab, so that eDoc Sales Orders can check for duplicate customers, in the same way that other eDoc types check for duplicate suppliers:



## User Preferences

eDocs Sales Orders observe the settings on the eDoc Preferences window, as with other transaction types. New options relating to eDoc Sales Orders have been added to the Type Options tab of the eDoc Preferences window:



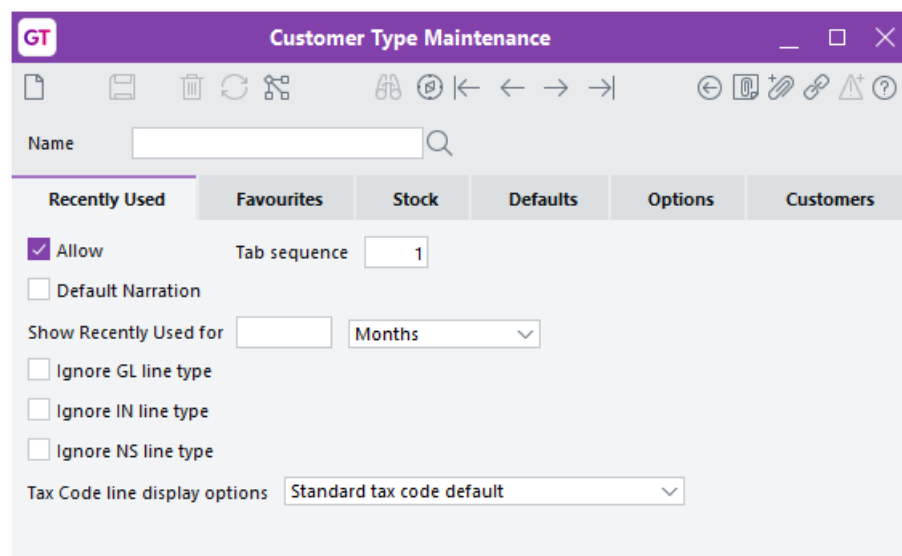
Most of the options are the same as options for existing transaction types—new options specific to eDoc Sales Orders are:

- **Display Sales Order on Creation** – If this option is ticked, then when a sales order is created from an eDoc Sales Order record, the order will be displayed along with any messages or prompts, e.g. insufficient inventory. If this option is not ticked, the sales order will not be displayed, but any messages or prompts relating to the sales order will.
- **Display Stock Item Available Balance** – If this option is ticked, a **Qty Available** column will be available on the eDoc Sales Order window when adding line items (see page 14).
- **Only on selection of Show Available Balance** – This option becomes available if **Display Stock Item Available Balance** is ticked. When this option is ticked, the **Qty Available** column on the eDoc Sales Order window will not be populated until the **Show Qty Available** button is clicked (see page 14).

## Customer Types

A new Customer Type Maintenance window has been added for eDocs—you can open it at System > eDocs > Customer Type Maintenance. This window is used to group customers into types, and for each type, set options that affect how eDocs Sales Orders will behave. It behaves similarly to the existing Supplier Type Maintenance window.

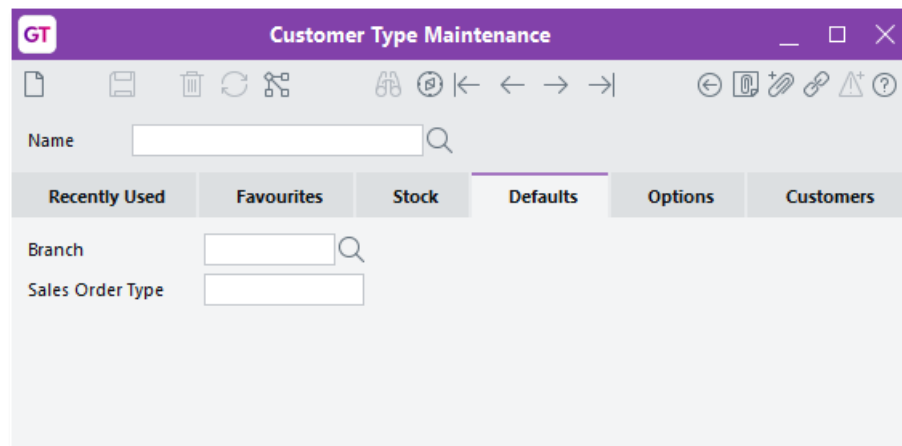
The window's Recently Used tab lets you set options that affect how the Recently Used tab appears on the eDoc Sales Order window for customers of each type (see page 14):



The Favourites and Stock tabs let you choose whether or not to show these tabs on the eDoc Sales Order window and what order they should appear in.

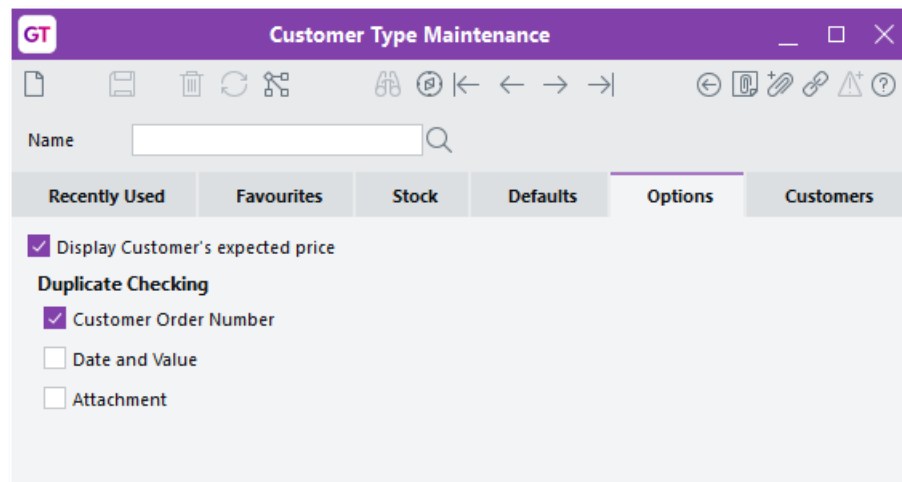


The Defaults tab let you specify a default branch and sales order type for eDocs Sales Orders:

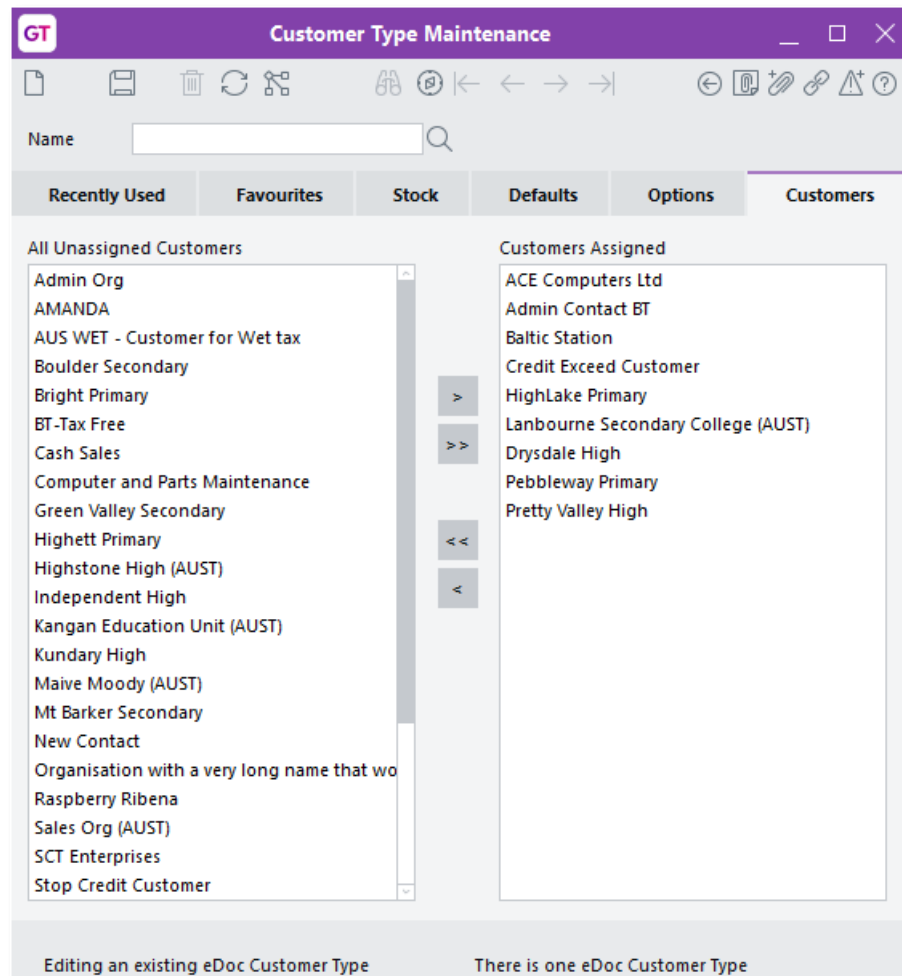


**Note:** The **Sales Order Type** field is only available if the **Use order type entry** option on the SO Module Control window is ticked.

On the Options tab, you can choose whether or not to display a **Customer Expected Price** field on the eDoc Sales Order window header (see page 12). You can also select whether to check for duplicate Customer Order Numbers, dates and values, and attachments.



The Customers tab lets you assign customers to each customer type. Any customers who have not currently been assigned to a customer type appear in the list on the left. Select customers and use the arrow buttons to assign them to the customer type or remove them from it.

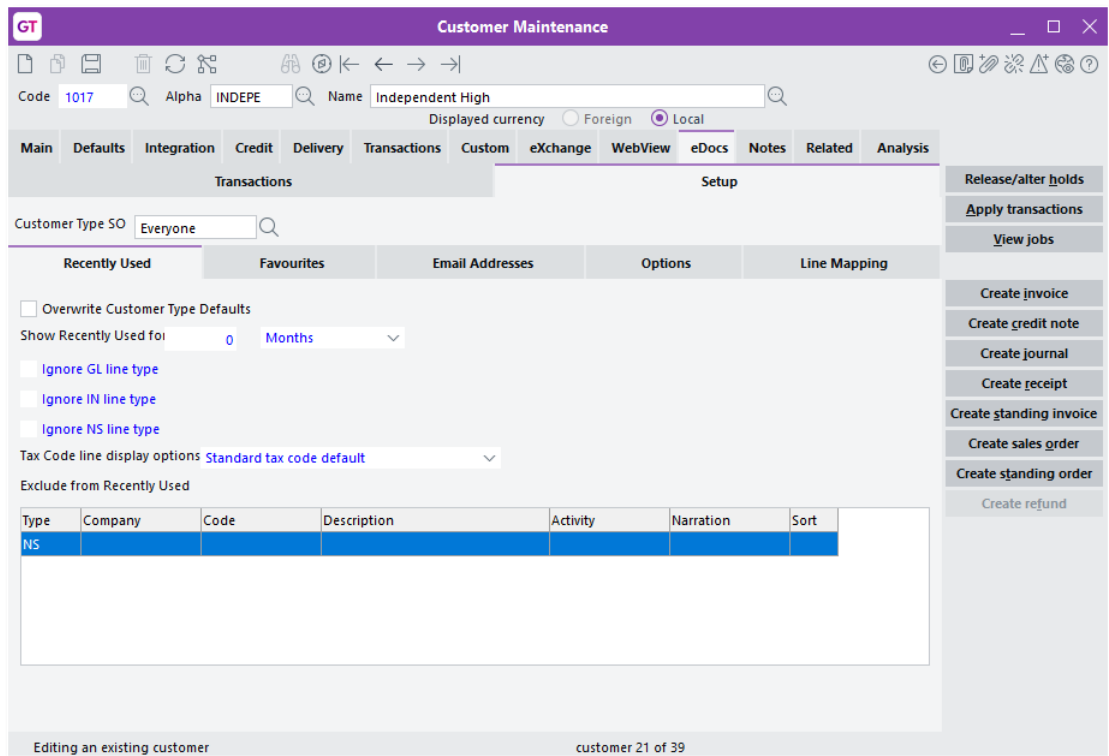


## Customer Maintenance

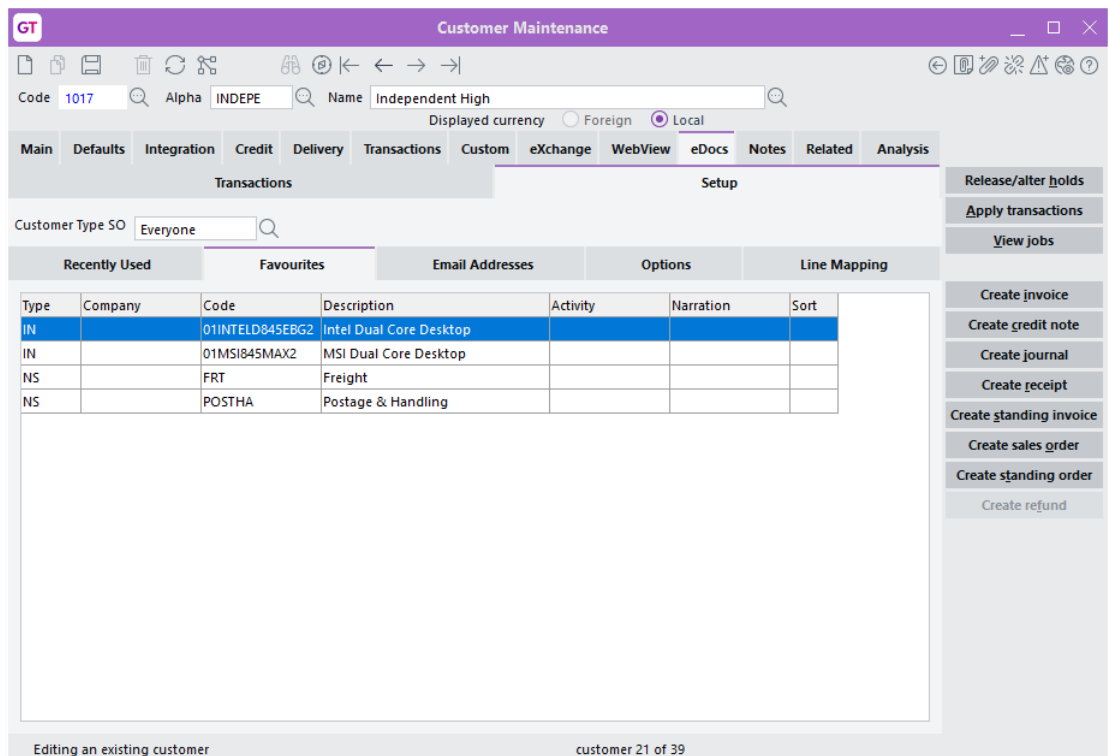
The eDocs > Setup tab of the Customer Maintenance window has been expanded to capture details to do with eDoc Sales Orders. The Setup tab is now divided into the following sub-tabs:

- Recently Used
- Favourites
- Email Addresses
- Options
- Line Mapping

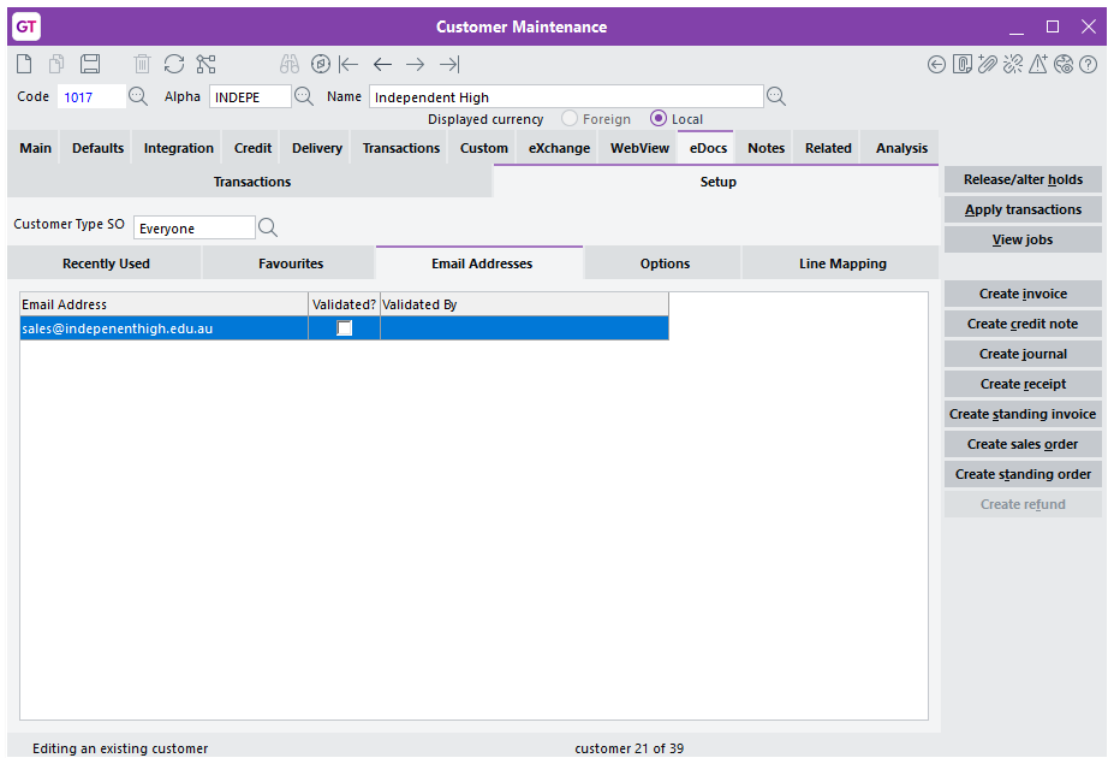
The Recently Used tab lets you set up the appearance and function of the Recently Used tab in the eDoc Sales Order window (see page 14), overriding the settings from the customer's customer type. You can also enter any line items to exclude from the Recently Used tab for this customer.



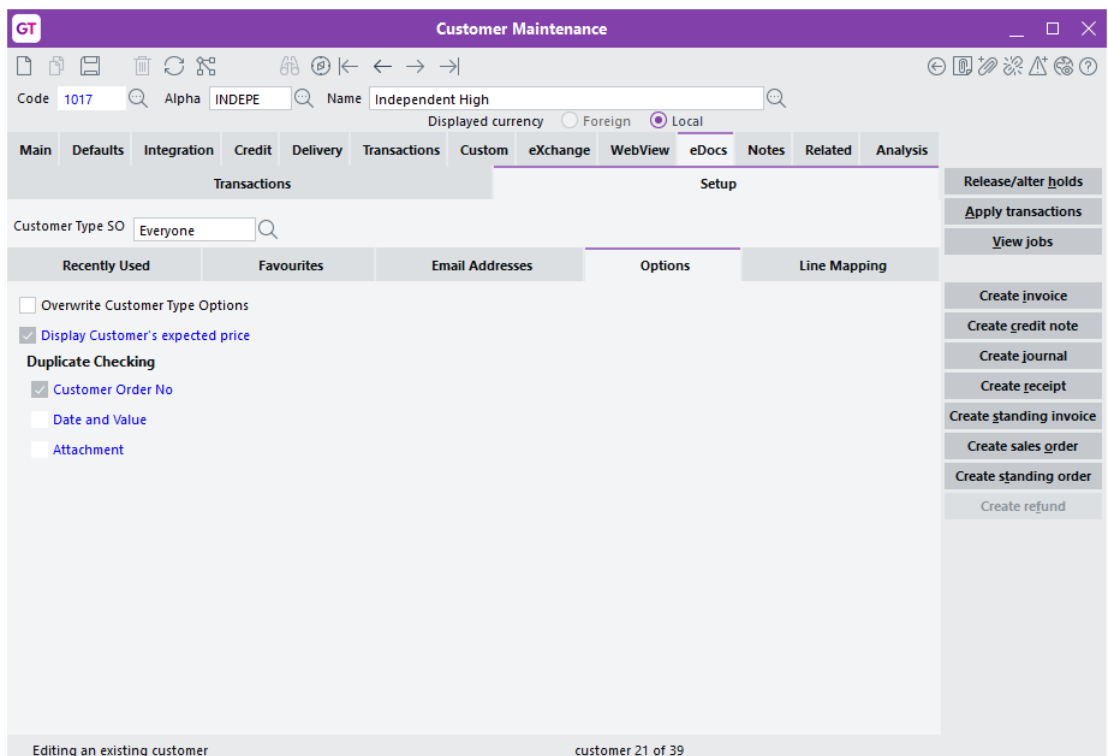
The Favourites tab lets you enter line items to appear on the Favourites tab of the eDoc Sales Order window (see page 14):



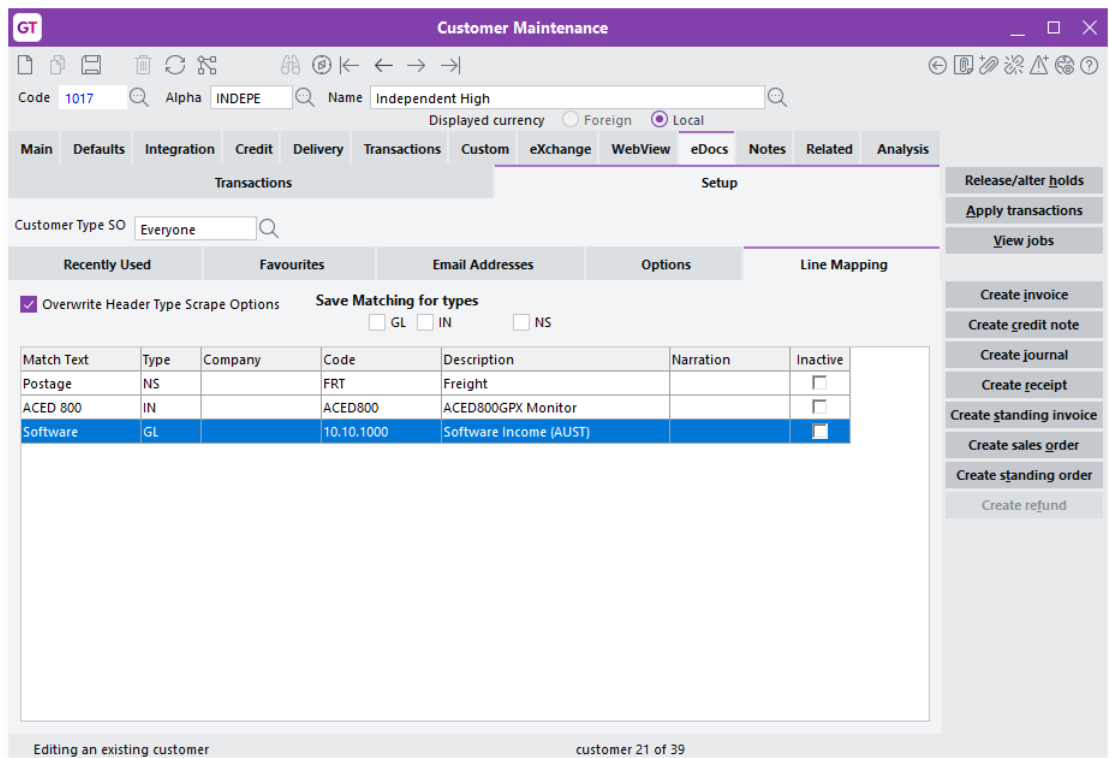
The Email tab contains the email addresses that were on the Setup tab in previous versions—these are the addresses that this customer uses when sending orders for import into eDocs.



The Options tab lets you override the Options settings from the customer's customer type (see page 7) if necessary.



On the Line Mapping tab, you can set up rules for mapping lines in scraped data to items in the Greentree system.

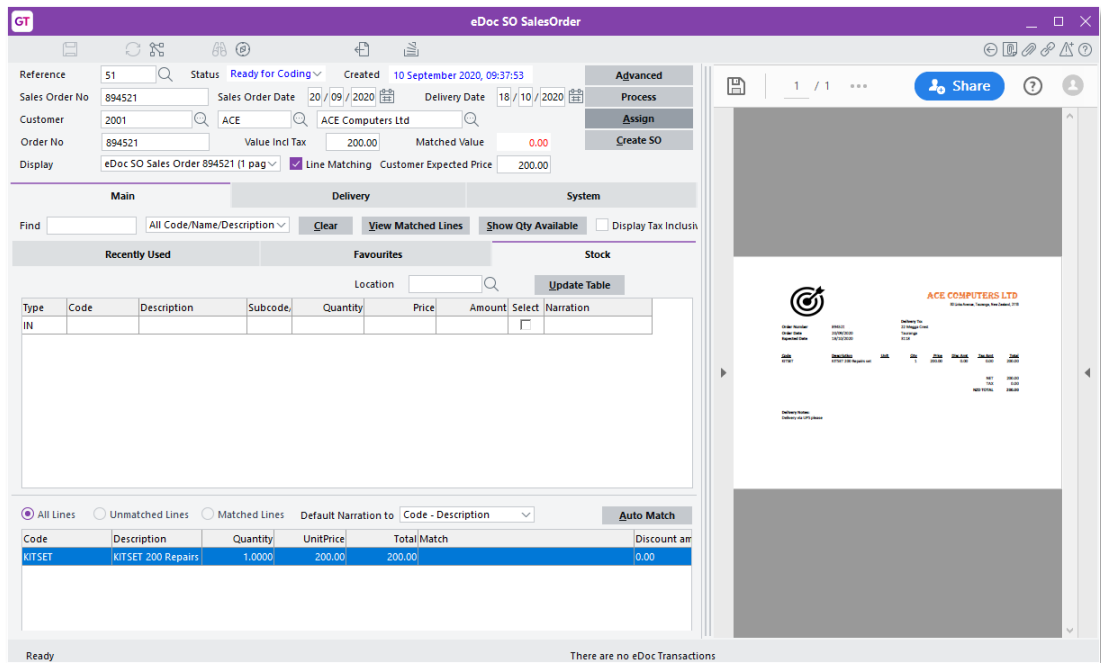


For each mapping you want to set up, enter the text to be matched into the **Match Text** column, then select the item that should be added to an eDoc Sales Order when that text is detected.

A customer's line mapping can be automatically updated for matches made manually on the eDoc Sales Order window. This is controlled by the **Save Matching for Types** options on the Scrape Integration tab of the Type Maintenance window (see page 3). The **Overwrite Header Type Scrape Options** check box lets you override those options for each customer where necessary.

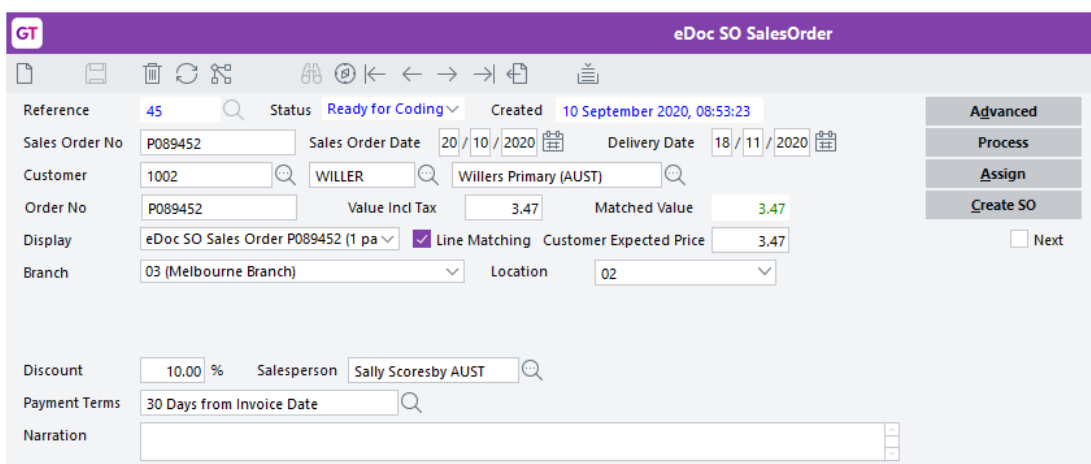
## Creating eDoc Sales Orders

Once you have set up eDocs Sales Orders, documents can be imported from a file location or email address in the same way as any other eDocs. Depending on your configuration, document information can be scraped and used to populate the eDoc Sales Order, or you can enter information manually. In either case, the eDoc Sales Order header and line information is edited on the new eDoc Sales Order window:



## Entering Header Information

Most of the details in the header section of the eDoc Sales Order window can be entered manually or populated via data scraping. Additional fields are available if the **Allow extended header** option is selected for the "SO Sales Order" type on the eDocs Preferences window (see page 5).



Fields of note include:

- **Sales Order No** – can be entered manually or populated automatically when the sales order is created.
- **Display** – choose whether to view the original document, view the scraped XML data, or the view document in the Xtracta scraping service, where you can train the service to identify data from documents.
- **Matched Value** – the current total of line items entered for the eDoc Sales Order. This amount is displayed in green if it matches the **Value Inc Tax**; otherwise it appears in red.
- **Customer Expected Price** – this field is available if it was enabled on the Customer Type Maintenance window (see page 7). It displays the total amount from the customer order, which can be scraped or entered manually.
- **Next** – if this box is ticked, then when an eDoc Sales Order is saved, the next eDoc Sales Order will be displayed. If it is unticked, the window will be cleared on saving.

Clicking the **Advanced** button in the header opens the Advanced window showing extended header information, in the same way as other eDoc types:

The screenshot shows the 'eDoc SO SalesOrder Advanced' window. The fields are as follows:

Reference	50	Status	CODING	Created	10 September 2020, 09:37:50
Type	SO SalesOrder	Company	Greentree4 QA System 2020.4-1 (eE)		
Branch	01 (Brisbane Branch)	Location	02		
Currency	NZD	Rate	1.13802000	Fixed	<input type="checkbox"/>
Discount	0.00 %	Salesperson	Steve Sampson AUST		
Payment Terms	30 Days from Invoice Date				
Narration					

Clicking the **Process** button in the header lets you run Alert and Approval rules, if any have been setup for this document type and status.

Clicking the **Assign** button in the header lets you assign the record to a particular user or team, in the same way as other eDoc types.

Clicking the **Create SO** button creates a sales order record from the eDoc Sales Order—see “Creating a Sales Order” on page 17.

## Manually Entering Line Items

Where documents are imported without being scraped, you can enter the header and line items for the eDoc Sales Order manually. The Main tab of the eDoc Sales Order window has three sub-tabs that let you select or enter line items:

- **Recently Used** – this tab displays any line items that you have recently added to eDoc Sales Orders. Its behaviour is set up on the Customer Type Maintenance window (see page 6), although this can be overridden for individual customers on the Customer Maintenance window (see page 8). Tick the **Select** box for any item to add it to the eDoc Sales Order.

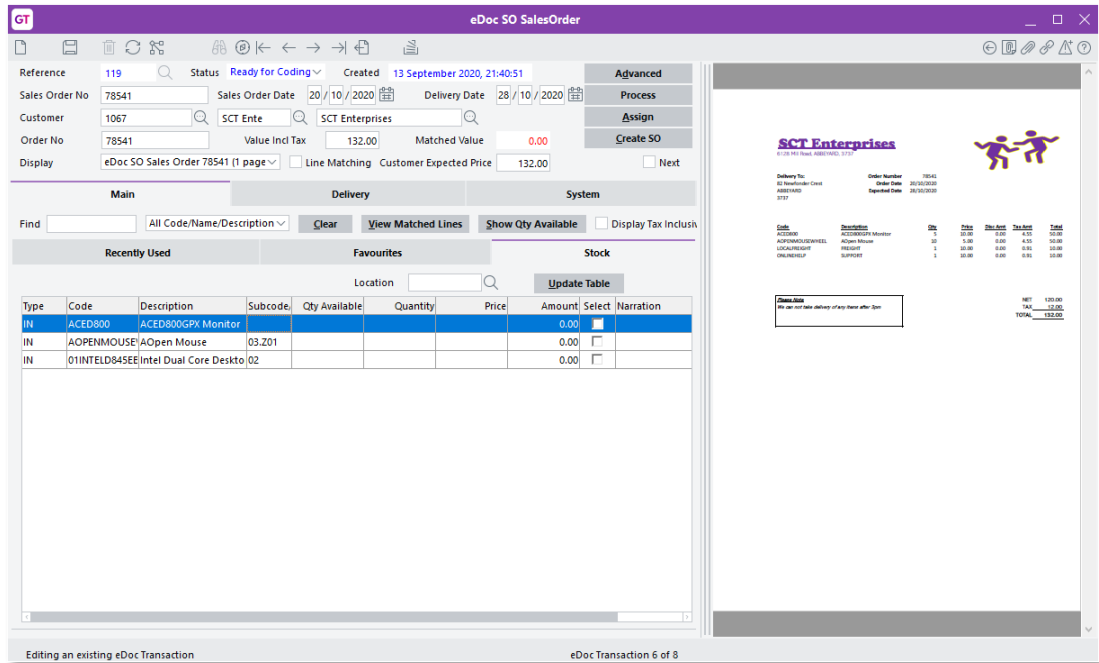
Type	Code	Description	Subcode	Qty Available	Quantity	Price	Amount	Select	Narration
GL	10.10.1000	Software Income (AUST					0.00	<input type="checkbox"/>	
GL	10.10.1020	Service Income					0.00	<input type="checkbox"/>	
GL	30.10.2550	Events					0.00	<input type="checkbox"/>	
IN	00AOPEN17MC	AOpen 17" LCD Monitc	02	73.0000			0.00	<input type="checkbox"/>	
IN	01AOPENAX4B5	AOpen Dual Core Desk	02	278.0000			0.00	<input type="checkbox"/>	
IN	Kitset	Kitset not held in stock	02	0			0.00	<input type="checkbox"/>	
NS	INSURA	Insurance					0.00	<input type="checkbox"/>	
NS	OTHCHR	Other Charges					0.00	<input type="checkbox"/>	

- **Favourites** – this tab displays a customisable list of items that you want to have quick access to. The list of favourites is set up for each customer on the Customer Maintenance window (see page 8). You can add a to the list by clicking the **Add Favourite** button, if this has been enabled in the eDoc Preferences (see page 5). Tick the **Select** box for any item to add it to the eDoc Sales Order.

Type	Code	Description	Subcode	Qty Available	Quantity	Price	Amount	Select	Narration
IN	ACER25LCD	Acer 25" LCD Monitor	02	100.0000			0.00	<input type="checkbox"/>	
NS	FRT	Freight					0.00	<input type="checkbox"/>	
NS	POSTHA	Postage & Handling					0.00	<input type="checkbox"/>	



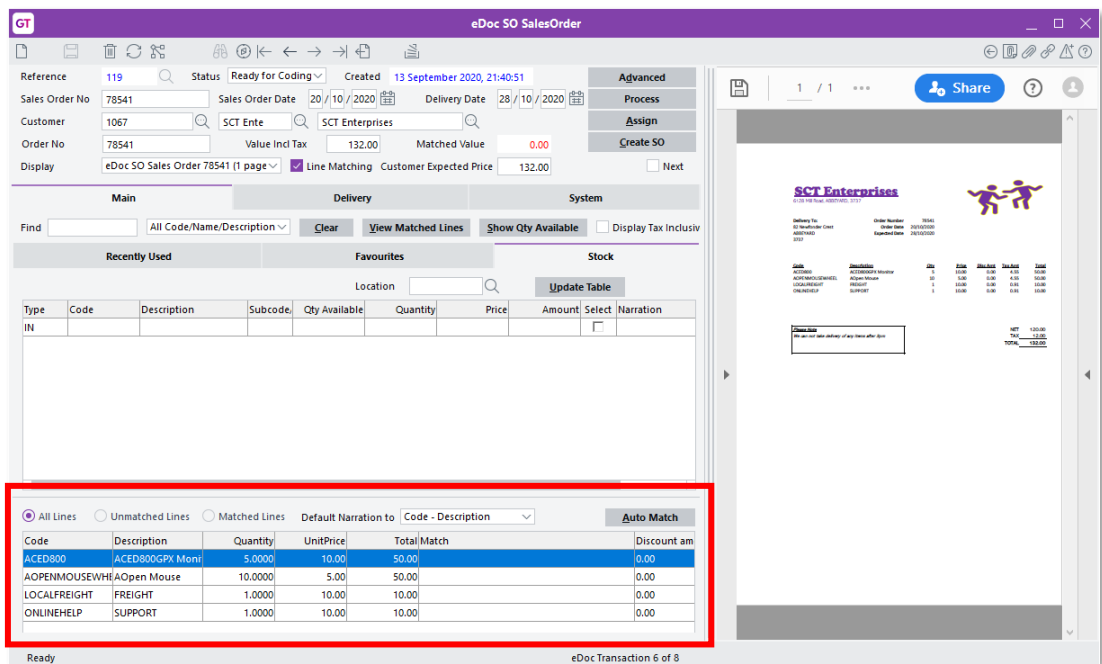
- **Stock** – this tab lets you enter the details of line items manually. Double-click on a line item to edit its details on the Edit Line Item window, which functions in the same way as with other eDoc types. Tick the Select box for any entered item to add it to the eDoc Sales Order.



## Entering Line Items via Scraping

Where a document has been scraped by the Xtracta data extraction service, any line item details identified in the document are copied to the eDoc Sales Order automatically. Any missing lines can then be entered manually, using the same controls detailed under “Manually Entering Line Items” on page 14.

When a document has been scraped, a **Line Matching** check box in the header controls the visibility of extra line mapping controls at the bottom of the Main tab:



Any line items identified by the data scraping are displayed—you can then match these items to line items in the Greentree system. Click **Auto Match** to automatically match scraped items to Greentree items, based on the line mapping rules set up for the customer on the Customer Maintenance window (see page 11).

## Delivery Details

The Delivery tab contains the details that would appear on the Delivery tab of a sales order. If delivery details were identified in a scraped document or if they have been set up for the customer on the order, they will be entered here automatically, but you can also enter or edit the details manually. When a sales order is created from the eDoc Sales Order, the details here will be copied to the sales order.

The screenshot displays the 'eDoc SO SalesOrder' interface. At the top, there is a purple header with the 'GT' logo and the title 'eDoc SO SalesOrder'. Below the header is a toolbar with icons for save, refresh, search, and print. The main form area is divided into three tabs: 'Main', 'Delivery', and 'System'. The 'Delivery' tab is currently selected and active. It contains several sections: 'Address' with fields for Address #, Name, Address (with a location pin icon), Suburb, Post code, and Country; 'Contacts' with fields for Phone, Mobile, Fax, Contact, Email, Web, Run #, and Drop #; and 'Additional Info' with a text area containing 'Delivery via UPS please'. Above the tabs, there is a summary section with fields for Reference (50), Status (Ready for Coding), Created (10 September 2020, 09:37:50), Sales Order No (89452122), Sales Order Date (20/09/2020), Delivery Date (18/10/2020), Customer (2001), ACE, ACE Computers Ltd, Order No (89452122), Value Incl Tax (100.00), Matched Value (0.00), and Display (eDoc SO Sales Order 89452122 (1 p)). On the right side of the summary section, there are buttons for 'Advanced', 'Process', 'Assign', and 'Create SO'.

## System Information

The System tab contains subtabs for Fields, Actions and Security. These tabs function in the same way as for other eDocs document types.

## Creating a Sales Order

Once all details have been entered, click **Create SO** to generate a sales order record from the eDoc Sales Order. Before creating the sales order, Greentree performs validation on the eDocs Sales Order record and alerts you to any problems it encounters. This can include:

- No customer has been entered
- No salesperson has been entered
- The customer is on Stop Credit
- The entered **Sales Order No** is not unique
- The **Value Incl Tax** and **Matched Value** do not match
- The order exceeds the maximum order value for sales orders
- No stock location has been selected
- A line discount exceeds the maximum discount allowed
- A serial or lot number has not been entered for a line item that requires one
- There is insufficient inventory for one of the line items (and backorders are not allowed)

If any errors occur, you are returned to the eDoc Sales Order record where you can correct the errors, e.g. enter any missing information. In the case of insufficient inventory, the standard Insufficient Inventory Available window may appear, so you can choose how to deal with the situation, e.g. allow the item to go into negative stock, or put the item on backorder.

**Note:** If the **Value Incl Tax** and **Matched Value** do not match, you may need to add or edit line items so that the two values are the same.

Once the sales order has been created, you can view it as you would any other sales order. You can click the **View eDoc** button to open the original eDoc Sales Order record, and the original PDF document from the eDoc Sales Order is included in the sales order's attachments.

The screenshot displays the 'SO Order Entry' window with the following details:

- Order Detail:** Number: TESTTAX01, Branch: 02 (Sydney Branch), Order Date: 07/09/2020, Delivery Date: 07/09/2020, Location: 02.
- Customer Detail:** Code: 1000, Alpha: KANGAN, Name: Kangan Education Unit (AUST), Currency: Australian Dollars, Rate: 1.00000000 (Fixed), Discount: 5.00%, Salesperson: Steve Sampson AUST, Payment Terms: 30 Days from Invoice Date, Order Number: TESTTAX01.
- Print Options:** Packing Slip, Order Status, Invoice, On Hold, Cancel Order, Req Link, Save Header.
- Summary:** Discount: 38.41, Surcharge: 0.00, Net: 729.82, Tax: 72.99, Total: 802.81.

The 'View eDoc' button in the top right corner is highlighted with a red box.

## Reviewing Customer Transactions

Any eDocs Sales Orders that have been processed for a customer are listed on the Transactions tab of the Customer Maintenance window, along with all other eDocs transaction types. Select “SO Sales Order” from the **Type** dropdown to view just the eDoc Sales Orders:

The screenshot shows the 'Customer Maintenance' window for customer 'SCT Enterprises'. The 'Transactions' tab is active, displaying a table of transactions. The table has the following data:

Type	Reference	Date	Created	Total	Status	User	Team	Generated Ref.
SO Sales Ord	118	20/09/2020	13 September 2020, 2	1320.00	Completed			884571
SO Sales Ord	119	20/10/2020	13 September 2020, 2	132.00	Ready for Co			78541

## Update to eDoc AP Invoices

Many Australian companies put their BSB and Bank Account Number on separate lines on invoices. To account for this, eDoc AP Invoices for Australian companies now store bank account numbers in three separate fields:

- Bank Account – The full bank account number
- Bank Account Excl. BSB – The bank account without the BSB number
- BSB Number – The BSB number by itself

# Desktop – Ordinary Weekly Pay

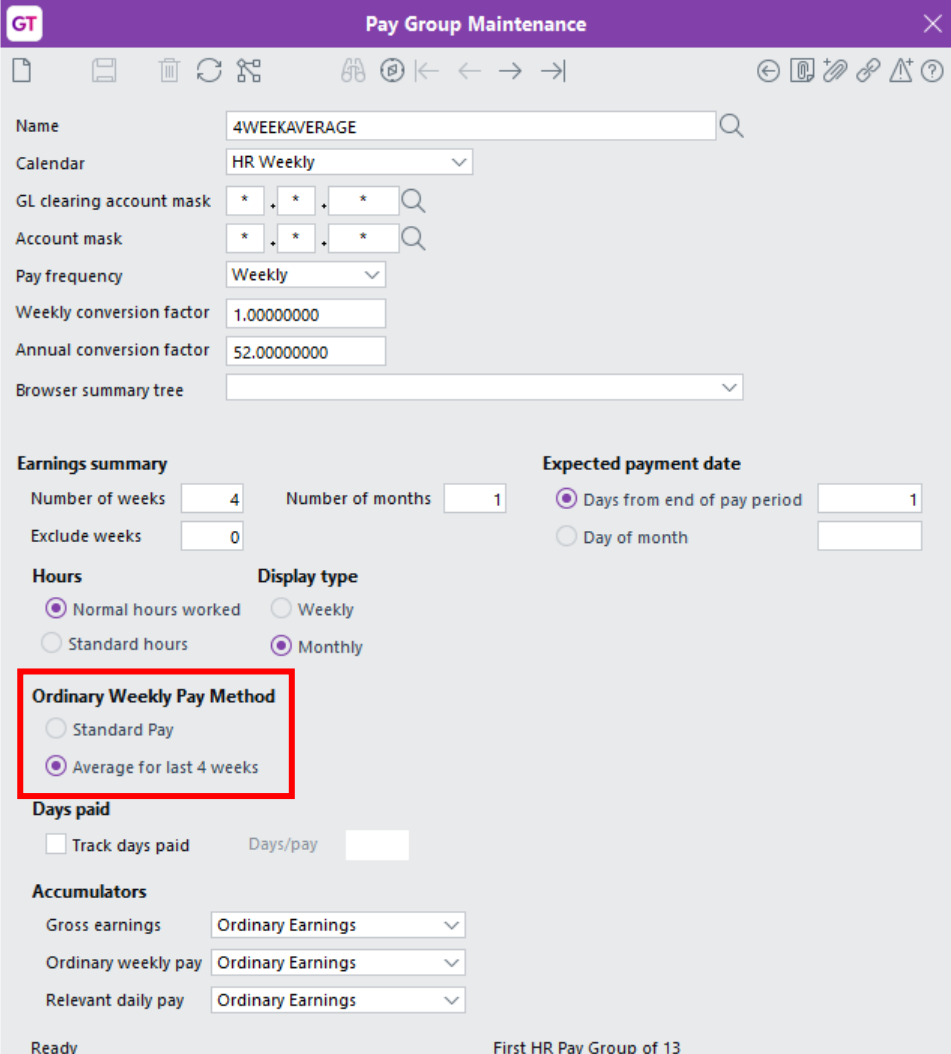
*These changes applies to NZ companies only*

This release adds new options for the calculation of employees' Ordinary Weekly Pay. When an employee takes annual leave, this is paid out at the greater of the employee's Ordinary Weekly Pay (OWP) or their Average Weekly Earnings (AWE).

In previous versions, OWP could be calculated manually from an employee's Standard Pay, or if this was not possible, as an average of the employee's last four weeks' gross earnings. This release adds the option to explicitly choose the method for calculating employees' OWP.

## Setting Ordinary Weekly Pay Methods

We've added a new **Ordinary Weekly Pay Method** setting to the Pay Group Maintenance window:



The screenshot shows the 'Pay Group Maintenance' window for a pay group named '4WEEKAVERAGE'. The window is divided into several sections:

- Name:** 4WEEKAVERAGE
- Calendar:** HR Weekly
- GL clearing account mask:** \* . \* . \*
- Account mask:** \* . \* . \*
- Pay frequency:** Weekly
- Weekly conversion factor:** 1.00000000
- Annual conversion factor:** 52.00000000
- Browser summary tree:** (empty)
- Earnings summary:** Number of weeks: 4, Number of months: 1, Exclude weeks: 0
- Expected payment date:** Days from end of pay period: 1, Day of month: (empty)
- Hours:** Normal hours worked (selected), Standard hours (unselected)
- Display type:** Weekly (unselected), Monthly (selected)
- Ordinary Weekly Pay Method:** Standard Pay (unselected), Average for last 4 weeks (selected) - This section is highlighted with a red box.
- Days paid:** Track days paid (unselected), Days/pay: (empty)
- Accumulators:** Gross earnings: Ordinary Earnings, Ordinary weekly pay: Ordinary Earnings, Relevant daily pay: Ordinary Earnings

At the bottom of the window, it says 'Ready' and 'First HR Pay Group of 13'.

The new setting has two options: **Standard Pay** and **Average for last 4 weeks**.

The **Standard Pay** option is best for employees who work regular hours.

The standard pay amount is based on pay items in an employee's pay that are:

- set as the default pay (including classification and additional paysets), and
- included in the Ordinary Weekly Pay accumulator.

The standard pay hours value is based on pay items that are:

- set as the default pay (including classification and additional paysets),
- included in the Ordinary Weekly Pay accumulator, and
- have a transaction type that is set to "Include in normal hours".

The **Average for last 4 weeks** option is useful for casual employees who work irregular hours, or employees who have a basic pay but often have extra earnings to be included in the calculation for leave, such as regular overtime or commissions.

**Note:** For existing pay groups, this setting will be set to **Average for last 4 weeks** by default; for new pay groups added after the upgrade to version 2020.5.0, the **Standard Pay** option will be selected by default.

Employees inherit the **Ordinary Weekly Pay Method** setting from their pay group, unless the **Override settings on pay group** option is ticked on the Employee Maintenance window. In this case, you can select an option for the employee's **Ordinary Weekly Pay Method** manually:

The screenshot shows the 'HR Employee Maintenance' window for employee 'John Brown' (Code: BROWNJ). The 'Options' tab is active. The 'Override settings on pay group' checkbox is checked. Under the 'Ordinary Weekly Pay Method' section, the 'Standard Pay' radio button is selected, and the 'Average for last 4 weeks' radio button is also visible. The 'Days Paid' section has 'Track Days Paid' unchecked. The 'Accumulators' section has 'Gross earnings', 'Ordinary weekly pay', and 'Relevant daily pay' dropdown menus.

**Note:** For employees who had the **Override settings on pay group** check box ticked before the upgrade to version 2020.5.0, this setting will default to the **Average for last 4 weeks** option.

## Employee Balances

The Balances window has been updated to clearly label the OWP and AWE values, and to show the two methods for calculating OWP (where previously only the **Average for last 4 weeks** row was displayed):

**Balances**

Employee: **BROWNJ** **Brown, John** As at: **16 / 08 / 2020**

Show balance in hours  Show balance in days  Show balance in weeks

Trans Type	Description	Accrual Rule	Entitled	Current Rate	Accrued	Accrued Value	Avg Hourly Rate	Not Entit
201DIL	Day in Lieu			\$15.25		\$0.00		
202	Annual Leave	Annual Leave - Full Tim		\$15.25		\$1,168.80	\$32.42	
203	Sick Leave	Sick Leave		\$15.25		\$1,368.00	\$14.25	
209	Long Service Leave	Long Service Leave		\$15.25		\$0.00		

**Earnings summary**

Based on:  Normal hours worked  Standard hours

	Weekly	Hours	Hourly Rate	
Ordinary Weekly Pay				
Standard Pay	\$638.00	41.0000	\$15.56	
Average for last 4 weeks	\$541.50	41.0000	\$13.21	... Based on 1 pays (10/08/2020 - 16/08/2020)
Average Weekly Earnings				
Average for last 52 weeks	\$42.13	41.0000	\$1.03	... Based on 1 pays (10/08/2020 - 16/08/2020)
Average adjusted for LWOP	\$42.13	41.0000	\$1.03	... Based on 1 pays (10/08/2020 - 16/08/2020, Divisor = 52.00)

**Day summary**

	Week 1	Week 2	Week 3	Week 4	Average	Rate

Close

This makes it easy to compare the results of the two OWP calculation methods, and to compare the OWP and AWE rates, so it is clearer overall which rate will be used when annual leave is paid out.

**Note:** The **Standard Pay** values will be blank for existing pays.

# Desktop – Sick Leave in Days

*These changes applies to NZ companies only*

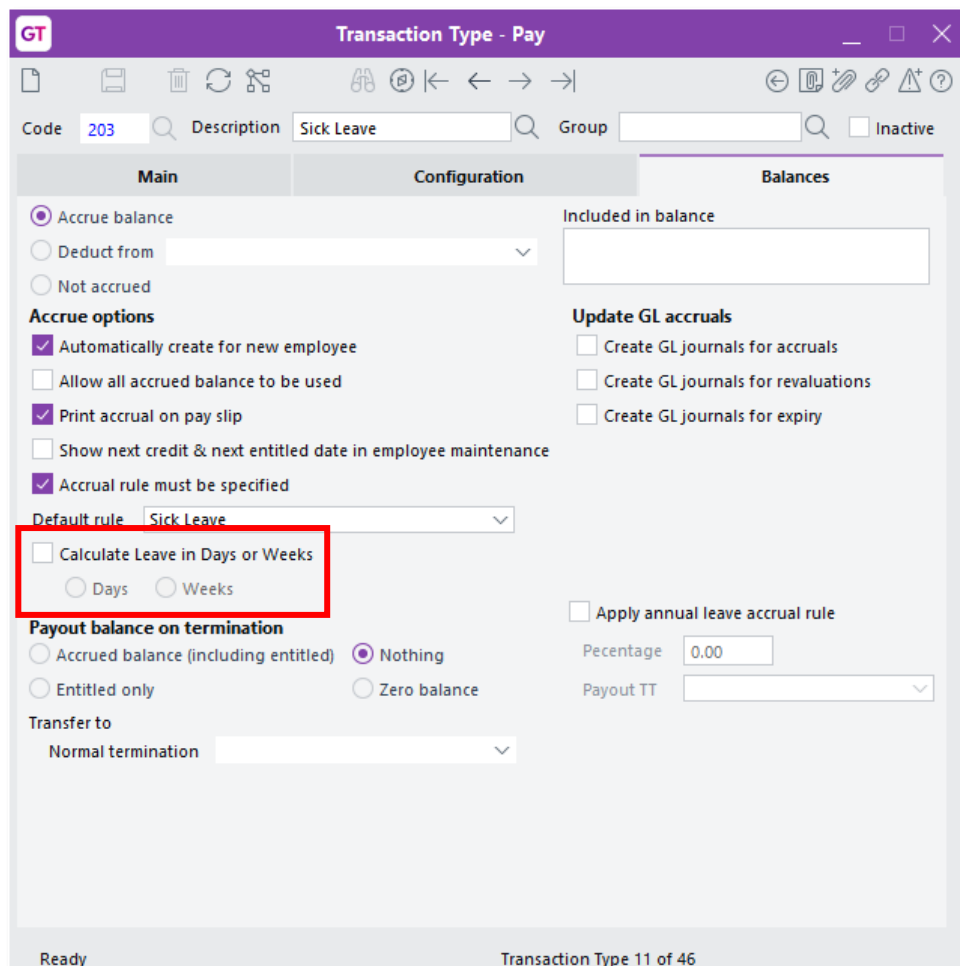
This release includes enhancements and improvements to help you to comply with regulatory compliance requirements, as well as help to provide you with more control and visibility when managing leave entitlements. These enhancements make it easier for you to calculate and report on an employee's sick leave in days.

Balances are converted from hours to days based on the **Std Hrs/Day** value from the Balance Tracking tab of the Employee Maintenance window.

## Changes to Setup Options

### Transaction Type – Pay Form

The **Calculate Leave in Weeks** option on the Balances tab has been changed to **Calculate Leave in Days or Weeks**. When this option is ticked, you can choose whether the transaction type is calculated in days or weeks:



If a transaction type was set to calculate leave in weeks before upgrading to version 2020.5.0, its **Calculate Leave in Days or Weeks** option will be ticked and **Weeks** will be selected; if not, the option will be unticked.



## Employee Maintenance

A new **Calculate Leave in Days** option is available on the Balance Tracking tab:

The screenshot shows the 'HR Employee Maintenance - Payroll' window with the 'Balance Tracking' tab selected. The 'Calculate Leave in Days' checkbox is highlighted with a red box. The window displays employee details for 'John Brown' and various configuration options for leave calculation.

Trans Type	Description	Accrual Rule	Max Overdrawn	Start Date Override	Inactive
201DIL	Day in Lieu		0.0000		<input type="checkbox"/>
202	Annual Leave	Annual Leave - Full Tim	0.0000		<input type="checkbox"/>
203	Sick Leave	Sick Leave	0.0000		<input type="checkbox"/>
209	Long Service Leave	Long Service Leave	0.0000		<input type="checkbox"/>
PH203	PH Sick Leave	Sick Leave	0.0000		<input type="checkbox"/>

If any of the leave types that default for a new employee are set to calculate in days, then **Calculate in Days** will be ticked by default for new employees; otherwise, new employees will have this option unticked by default.

**Note:** You can update this setting for multiple employees in bulk using the new Bulk Update Employee Leave in Days utility—see page 24.

## Employee Balances

Where leave is calculated in days, the Transactions > Balances tab of the HR Employee window now displays values in days. To allow for the fact that balances could be displayed in hours, days or weeks, the Balances section of this tab now displays “Units” in column headings, with a new **Units** column displaying what the unit is for each transaction type:

The screenshot shows the 'HR Employee Maintenance' window with the 'Transactions > Balances' tab selected. The 'Balances' table is highlighted with a red box. The table displays leave balances for employee 'dsaf' as of 08/09/2020.

Trans Type	Description	Entitled Hours	Accrued Hours	Accrued Value	Not Entitled Hours	Entitled Units	Accrued Units	Not Entitled Units	Units
202	Annual Leave	160.0000	160.0000	\$0.00	0.0000				
203	Sick Leave	0.0000	0.0000	\$0.00	0.0000				
209	Long Service Leave	40.0000	40.0000	\$0.00	0.0000				
PH202	PH Annual Leave	0.0000	0.0000	\$0.00	0.0000				
PH203	PH Sick Leave	160.0000	160.0000	\$0.00	0.0000	20.0000	20.0000	0.0000	Days

In the Transactions for [Transaction Type] section, a balance line will be displayed a value in the new **Qty Days** column if both the employee and the transaction type it relates to are set to calculate leave in days. (If either or both of them are not set to calculate leave in days, the balance will be displayed in hours, as in previous versions.)

If the balance includes transactions that were created before the leave in days options were ticked, the value in the **Qty Days** column will be blue; otherwise they will appear in the standard colour.

## Updating Employees

### Bulk Update

We've added a new Bulk Update Employee Leave in Days utility that lets you set the **Calculate Leave in Days** option for multiple employees in one operation. Open this utility at **HR > System > Utilities > HR System Scripts > Leave in Days Employee Setup**:

Code	Employee Name	Pay Group	Branch	Hours / Day	Select	Calculate Leave in Days
BROWNJ	Brown, John	Weekly	Christchurch	8.0000	<input type="checkbox"/>	False
CLARKC	Clark, Craig	Weekly	Auckland	8.0000	<input type="checkbox"/>	False
CP01	Power, Chris	Weekly	Auckland	8.0000	<input checked="" type="checkbox"/>	True
FENCHC	French, Carol	Weekly	Auckland	8.0000	<input checked="" type="checkbox"/>	True
HUGHESD	Hughes, Dan	Weekly	Wellington	7.5000	<input type="checkbox"/>	False
JONESB	Jones, Benjamin	Weekly	Auckland	8.0000	<input checked="" type="checkbox"/>	True

Select the required transaction type, then optionally filter the list of employees by Pay Group and/or branch. The **Include True** option determines whether or not the utility will show employees who already have the **Calculate Leave in Days** option ticked. It is unticked by default, so only employees who haven't already been set to calculate leave in days will be listed.

The **Calculate Leave in Days** column shows which employees are currently calculating leave in days and which aren't. If an employee does not have a **Std Hrs/Day** value entered, this column displays "Missing Std Hrs/Day", and it will not be possible to select the employee for updating.

Tick the box in the **Select** column for all employees you want to update, then click **Apply** to apply the update to all selected employees.

**Note:** Once transactions of the selected type have been recorded for an employee, the **Select** column becomes read-only for them.

## Balance Adjustments and Opening Balances

The Balance Adjustment Entry and Opening Balance windows have been updated to allow for adjustments to leave types that are calculated in days.

Trans Type	Description	Qty Hours	Qty Days	Qty Weeks	Amount	Narration	Entitled	Accrued
PH203	PH Sick Leave	16	2.0000					

You can now adjust employee's standard hours/day as well as their hours/week—the **Std Hrs/Week Adjustment** check box has been renamed to **Definition of a week adjustment** to reflect this.

A line will display a value in the **Qty Hours** column and the new **Qty Days** column if both the employee and the transaction type it relates to are set to calculate leave in days. (If either or both of them are not set to calculate leave in days, the balance will be displayed in hours only, as in previous versions.) You can update the hours value, and the days will be calculated automatically based on the employee's **Std Hrs/Day** value.

### Updating the Definition of a Week

Balances are converted from hours to days based on the **Std Hrs/Day** value from the Balance Tracking tab of the HR Employee Maintenance window. If this value is changed, a message window appears, showing the effects on the employee's leave balance. This message changes depending on whether Annual Leave calculation in weeks is turned on, and the setting of the **Behaviour when changing Agreed Definition of a Week** section on the HR Module Control window.

## Effects on Pay Entry

When entering leave on the Pay Entry window, the new **Qty Days** column contains a value if both the employee and the transaction type for that line are set to calculate leave in days. You can enter a value into the **Qty Hours** or the **Qty Days** column, and the other will be updated based on the employee's **Std Hrs/Day** value.

The screenshot shows the MYOB Pay Entry window for employee John Brown. The 'Pay' tab is active, and the 'Data' section shows a table with the following columns: Type, Trans Type, Classification, Qty Hours, Qty Days, Qty Weeks, Rate Man, Amount, Account/Job, Description, and Subcode/Acti. The table contains three rows: a 'GL' row with '22001' classification and '24.0000' Qty Hours; a 'GL' row with 'PH203' classification, '16.0000' Qty Hours, and '2.0000' Qty Days; and a 'GL' row with an empty classification. The 'Qty Hours' and 'Qty Days' columns for the second row are highlighted with a red box. The 'Data' section also shows 'Qty' as 16.0000, 'Rate' as 0.00, and 'Amount' as 0.00. The 'Description' field is 'Wages-Sick Leave'.

Type	Trans Type	Classification	Qty Hours	Qty Days	Qty Weeks	Rate Man	Amount	Account/Job	Description	Subcode/Acti
GL	22001		24.0000				0.00	10.10.2510	Wages-Service	
GL	PH203		16.0000	2.0000			0.00	10.10.2522	Wages-Sick Leave	
GL										

## Reporting on Sick Leave in Days

Leave quantities can now appear in days on Payslips and on the Leave Liability report. The HR Balance Transaction Listing, which could already display quantities in days, converts values between hours and days where necessary so that it always shows the correct totals.

## Making Sick Leave Requests

When entering a leave request in the desktop client, if the employee and transaction type are set to calculate leave in days, the **Use Calculated Leave** option is disabled. You can select “Hours” or “Days” from the **Use Specified** dropdown to enter the leave amount—the amount will be converted to days/hours using the **Std Hrs/Day** value.

The screenshot shows the 'HR Leave Request Entry' window. The 'Request No' is blank, and the 'Employee' is 'dsaf 454, 14154'. The 'Summary' is 'PH203 PH Sick Leave 14/09/2020 to 15/09/2020'. The 'Main' tab is active, showing fields for Employee (dsaf, Surname 454, First Name 14154), Leave Type (PH203 (PH Sick Leave)), Status (Unsubmitted), and Work Calendar (N/A). The 'Requested Leave' section shows dates from 14/09/2020 to 15/09/2020, with a time of 0:00 AM to 0:00 AM. The 'Use Specified' radio button is selected, and the 'Hours' dropdown is set to 16. The 'Calculated Request' table shows 16.0000 Hours, 2.0000 Days, and 0.4000 Weeks. The 'Leave Reason', 'Cancel Reason', and 'Reject Reason' fields are empty. The 'Approval Status' button is visible at the bottom right.

When entering a leave request on the website, you can enter the number of hours into the **Override** field:

The screenshot shows the 'Leave Request' website interface. The 'NUMBER' dropdown is set to 'Sick Leave', and the 'EMPLOYEE' is 'JOHN BROWN'. The 'Type' is 'Sick Leave'. The 'All day' checkbox is checked. The 'From' date is 11/09/2020. The 'To' date is blank. The 'Override' field is set to 16 hours. The 'Reason' field is empty. The 'Available as at' date is 11/09/2020. The 'Requested' and 'Balance' fields are both 0.00. The 'Days' and 'Hours' columns are both 0.0000.

# Desktop – ADP and OWP Features

*These changes applies to NZ companies only*

The INI file settings that enabled the Average Daily Pay (ADP) and Ordinary Weekly Pay (OWP) features from previous versions are no longer required. These features are now available by default.

## Update to .NET Framework Version

Greentree has increased the dependent .NET Framework version to 4.8 to take advantage of the added security and the support for TLS 1.2 in Greentree's email integration libraries. This includes Exchange Integration in EDI, Exchange File to Greentree in CRM Email Filing, Pop3 in eDocs and SMTP using STARTTLS.

This upgrade is essential for sites that integrate with email servers that require TLS 1.2 protocol.

If you see the error message "The requested security protocol is not supported" when testing or using connections, ensure you have .NET Framework 4.8 Runtime installed. The current version is shown in the Windows Registry at:

Computer\HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full.

# Resolved Issues

## Greentree Desktop

We've fixed these issues in Greentree Desktop:

- An error (1011) could occur on the Maintain Hours window that opens from the Working Calendar Maintenance window, if all six **From:** and **To:** fields were populated. This has been resolved.
- Changes to the job code on a JC Sales Adjustment (GL and non GL) were not saved. This has been resolved.
- An error (1035: String too long) could occur when importing timesheets if any timesheets lines had a narration that was more than 30 characters. This has been resolved.
- eRequisitions now allows non-quantity accounts to be selected.
- The error "You do not have privileges to this form" could appear when accessing reports from the Favourites menu. This has been resolved.
- When calls/service requests were created for JC Estimates, the Assigned Activity code was not populated. This has been resolved.
- A 1090 error occurred when submitting an unsaved leave request. This has been resolved.
- *NZ companies only* - The **Retiring or redundancy payments** option under **Tax as lump sum payment** was missing from the Transaction Type – Pay window. This has been resolved.

## Greentree Browser

We've fixed these issues in Greentree Browser:

- An error (1035: String too long) could occur on the Contact screen when saving a contact whose gender was not specified. This has been resolved.
- Manual changes to a Quote's delivery address were not transferred to the sales order created from the quote. This has been resolved.