## MYOB Greentree Release Notes 2021.1.0



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# Introduction

The 2021.1.0 release updates MYOB Greentree to produce files for payday filing in the new v2021 format.

**Note:** We recommend that you produce your KED and New and Departing Employees files and file them with the IRD before installing this upgrade.

We've also added the ability to add queries created using the Query Designer as panels on a desktop. Query panels support integration with 3D panels, and let you edit any parameters set up for the query and save parameters as defaults.

This release also includes enhancements to the security of the MYOB Greentree system (including the ability to authenticate against a Microsoft Exchange server using the OAuth 2 authentication standard) and fixes issues identified in Greentree Desktop and eDocs.

The sections below provide full information on all of the changes included in this release.

## **New Features**

## Desktop – Payday Filing Updates

#### These changes apply to NZ companies only

This release updates MYOB Greentree to produce files for payday filing in the new v2021 format. This includes the EI Return file and the *Employee Details* file, which replaces the New and Departing Employees file. The New and Departing Employees window is now the Employee Details window:

GT	Employee Details File	_ □ ×
From Date	/ / 🛱 To / / 🛱	
Pay Group	~ ·	
Branch	~	
Interface	Employee Details CSV post 1/04/2020 $\sim$	
File	Employee Details.csv	
		Save file path 📄
		<u>C</u> reate Close

Open this window at **HR > Payroll > Other Functions > Create Employee Details File**.

Select the new EI file format on the Inland Revenue Reporting Configuration window:

GT	Inland Revenu	e Reporting Conf	iguration	×
	K 68 @	©	© <i>⊅&amp;∆</i> ?	
KiwiSaver Employee	KiwiSaver Er	nployer	Special Tax Code	Other
Exclude from Gross	Include in Gross	PAYE Tax	Student Loans	Child Support
Earnings not liable for earner	's levy 208 (Earner Levy Exe	empt)	$\sim$	
Tax Credits for Payroll Donati	ons TCD (Tax Credit Pay	roll Donations)	$\sim$	
Maximum Rate for KiwiSaver	10 %			
IR348 Interface	EMS (IR348) post 1/	4/2012	$\sim$	
IR345 Interface	EDF (IR345) post 1/4	4/2012	$\sim$	
	Include AP With	holding tax details in	IR345/348 files	
El return interface	El return post 1/04/	2020	$\sim$	
El amendment interface	El amendment post	1/04/2020	$\sim$	
Editing an existing Inland R	levenue Reporting Configu	ation		

Open this window at **HR > System > Payroll > Inland Revenue Reporting Configuration**.

#### Updates to KiwiSaver Information

The Employee Details file now includes information on employees opting in or out of KiwiSaver. The KiwiSaver information included in payday filing has been expanded to include information on employees who opt out of KiwiSaver after the normal opt out period.

**Note:** Because KiwiSaver information is now included in the Employee Details file, you no longer need to produce and send the KiwiSaver Employment Details (KED) file. You can still produce a KED file from MYOB Greentree and send it to the IRD for now, but the KED file will not be accepted from 1 April 2021.

Employees can opt out of KiwiSaver between the ends of the second and eighth weeks of their employment (i.e. between days 14 and 56)—see <u>"Opting out of KiwiSaver" on the IRD website</u> for more information.

To opt out after the end of this period, a reason for the late opt out must be accepted by the IRD Commissioner before the opt out is effected. Updates have been made to the HR Employee Maintenance > Tax Config tab to capture this information:

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Code LITTLEE	Surname Littl	e	C	) First Na	me Emma			$\odot$			View All $\sim$
CV Involven	nent Medical	Org Chart	Develo	opment	Key Dates	Ev	ents	Security	Custom	Notes	ACTIVE
Main Default	ts Options	Tax Config	Payroll	Balance	Tracking	Other	Tran	nsactions	Positions	Functions	Attachments
IRD Number 0713	55689										<u>P</u> ay Now
Enrol in KiwiSav	er										Process Accruals
Eligibility	New 💿 Existing	Auto enrol 🔘	Existing Opt	in	Contribut	ion holid	ays		Charle Data		Terminate
KiwiSaver Status A	uto-enrol	~			Employee	& Emplo	yer 🔤	start Date	Stop Date		<u>R</u> e-activate
Opt Out Date	28 / 11 / 2020 🛱	2									eHR Configuration
Payee Name	Emma Little	-									Leave Forecast
Bank Account	15468498746413										Leave Without Pay
Late Opt Out rea	ison										Leave without Pay
Other explanati	on			$\sim$							
Other reason											
Include in next E	mployee Details file										

The **Eligibility** field now has three options:

- New
- Existing Auto enrol (previously Existing)
- Existing Opt in

A new **KiwiSaver Status** dropdown lets you assign one of the following statuses to an employee:

- Auto-enrol
- Casual/Temporary Employee
- Existing KiwiSaver Member
- Not Eligible for KiwiSaver
- Opting in to KiwiSaver

Note: On upgrade, any users who have Enrol in KiwiSaver ticked and Eligibility set to "New" will have their KiwiSaver Status set to "Existing KiwiSaver Member". The dropdown is left blank for all other employees—KiwiSaver status is not required for existing employees. We recommend that you check all employees' KiwiSaver Status settings after upgrading to this release. MYOB Greentree now prevents you from opting an employee out of KiwiSaver less than 14 days after their start date. If you opt out an employee after day 56, you must specify the reason for the late opt out. The new **Late Opt Out reason** dropdown contains a list of possible reasons:

- Did not meet the criteria to join KiwiSaver
- Employer did not provide an investment statement
- Employer did not provide information pack within 7 days of start date
- Incorrectly enrolled employee under the age of 18
- IR send an investment statement on allocation of default scheme
- Opt-out application unable to be submitted within the time limit
- Other explanation

When "Other explanation" is selected, you must enter the reason into the new **Other reason** field.

The **Include in next KED file** option has been renamed to **Include in next Employee Details file**. As the Employee Details file replaces the KED file, ticking this option now means that the employee's details will be included in the next Employee Details file to be produced.

**Note:** When an employee's KiwiSaver details are changed, this option becomes ticked automatically, but you can untick it if you do not want the employee included in the Employee Details file.

#### KiwiSaver Exempt Income

This release adds the ability to report an income type for any transaction type that is exempt from KiwiSaver. This information is now reported for <u>new</u> employees in the Employee Details file as part of the payday filing updates.

**Note:** The Employee Details file does not include information about changes made to Allowances for existing employees.

A new **KiwiSaver exempt** dropdown is available on the Configuration tab of the Transaction Type – Pay window:

GT	Transaction T	ype - Pay	_ □ X
	68 @ ⊬	$\leftarrow \rightarrow \rightarrow \mid$	☺ 🖪 🖉 & ∆ ?
Code E01 C Description	Car Allow Ex Tax	Q Group	Q Inactive
Main	Config	juration	Balances
Include in accumulators		Other	
Name	Include	Apply GL alloc	ations
Allowances		Automatically	create default line for new employee
Apprentice Tracking		Excluded from	annual salary
Deductions		Available for L	eave Planning
ESCT - Employer Complying Fur	nd 🗖	Display Acc	rued Balance in Leave Balances Panel
ESCT - Employer Kiwi Saver		Display Ent	itled Balance in Leave Balances Panel
Exclude from Gross		Date Pange	Date is Compulson
Extra Pay		Badusing Line	
Extra Pay - Red / Retire		Reducing Line	~
Gross		Auto Add	~
Gross + Employer Super		Days in Lieu	
Kiwisaver		Rublic Holid	av worked
Leave		Alternate Ho	hiday
Leave Accrual		Alternaterna	, inday
Ordinary		Auto Add line	
Ordinary Earnings		O Days in lieu	accrual
Ordinary Hours		Cashing up	~
Payroll Donation Deductions			
Special Tax Code		Tax as lump su Tax as lump su Extra pay Retiring or r KiwiSaver exempt	Provide board-lodging-use of a he Some Honoraria payments Overpayment of an amount of an Retiring allowance Taxable allowances for accommod Some payments under a Voluntary
Ready		Transaction Type	36 of 39

Use this dropdown to indicate the type of KiwiSaver-exempt income that the transaction type represents. Choose from:

- Provide board-lodging, use of a house or part house or equivalent allowance
- Some Honoraria payments
- Overpayment of an amount of an employer's superannuation cash contribution
- Retiring allowance
- Taxable allowances for accommodation and living costs overseas
- Some payments under a Voluntary Bonding Scheme

See <u>"Gross pay for KiwiSaver schemes and complying funds" on the IRD website</u> for more information.

## Desktop – Windows Designer Update

The Windows Designer now supports customisation of the tables (also known as droplists) that show the results for search fields:

GT Windows	Designer - DemoCustomAR 🔄 🗆 🗙
	<u>S</u> ave <b>v</b>
Name search fiel	d (Customer) 🔻
Access	Hidden Read-only
Value	Mandatory Persistent Force capitals
Text	Select colour 🗸
	Font 8.25 Bold Italic Underline
Background 🔻	Select colour V
Position	Parent Form V
	Left 301 Top 32
Size	Width 347 Height 20
Parent aspect	Across None V Down None V
Tab order 💌	Index 26 Tab stop 🗸
Droplist	Width 400 Rows 6
	Column Property Width
	1 name 240
	2 code 100
	3 alpha 60
	4 autress 240 v

In the new Droplist section, you can:

- change the overall width of a results table and the number of rows it shows.
- add, remove and re-order columns, except for the first column.
- set the widths of individual columns to suit a site's typical data values.
- change what is shown in each column (except for the first column) by clicking the ... control next to the property and selecting a different property from the window that appears.

Properties can be the names of simple attributes of the underlying Jade class, e.g. the name of a customer, or can be more complex feature paths, e.g. the post code within an address.

**Note:** A Customisation is available on search fields shown directly on forms, not those embedded in tables.

## Desktop – Query Panels

You can now add queries as panels on a desktop. A new **Query** option is available in the Toolbox of the Desktop Designer—to add a query to a desktop, drag this option onto the Layout, then select the required **View** and **Query** from the Properties section:

ਯ		Desktop Designer		_ □ ×
	: #@⊬ ←	$- \rightarrow \rightarrow \mid$		$\bigcirc \blacksquare \not \supset \mathscr{C} \land \bigcirc$
Name 3D CRM			Q Import	Export Load Desk View All V
Layout	:	Availability		Security
Detail Caption Sales Desk Rows 6 ✓ Layout	Columns 9	Open as window     Show as separate     Show Background	Toolbox 30 3D Live Quite constant Query Published Financial Ke e Doc Header Published Financial Ke e Doc Header	20ftS
My Leads My Quotes	Query Teams Balances	Communications	eDoc Script Run Log     eDoc Approvals	✓ Add Delete
			Name Refresh Update in real time	Value C
Team Sales Quotes	Users Image	Quotes	Real time display delay (sec)	5 CPMOrganisation
Highlight Colours	_	🛞 Close All	Query Allow parameter dialog	Organisation Organisation
New Chang	ged Overdu	Restore Defaults	Parameters C Table Layout	<double change="" click="" parameters="" to=""></double>
Ready		Deskto	p Layout 2 of 40	

If the **Update in real time** property is ticked, workflow panels that display a query are updated dynamically when records that match the query are added, modified or deleted. The **Real time display delay** property lets you specify a delay between when a record is updated and when the update is reflected on the panel.

	my quotes	i cuina	bulances	contacts	Properties		
					Name	Value	2
					Refresh	V	_
	Team Sales Ouotes	licerc	Image	Quotes	Update in real time	V	
	ream sures quotes	03013	mage	quotes	Real time display delay (sec)	5	
					Dase Class	скиюгданізаціон	
	🖵 Sales Desk			🛞 Close All	View	Organisation	
				0	Query	Organisation	
H	lighlight Colours				Allow parameter dialog		
	New Change	ed	Overdue	Restore Defaults	Parameters	<double change="" click="" parameters="" to=""></double>	
	- <b>-</b>				<	· · · · · · · · · · · · · · · · · · ·	1
					Table Layout	Tile Format Define Query	
	Ready			Deskto	p Layout 2 of 40		

#### Integration with 3D Panels

When an entry on a Query panel is selected, any 3D panels on the desktop are updated to use the selected entry. In the example below, the Highstone High (AUST) organisation is selected, causing all of the 3D panels on the right of the desktop to display data for that organisation.

+ J. A\$		My Leads		C 🗗	Query				Highstone High (/	AUST) recent c	communic	ations ${} \leftrightarrow \leftrightarrow {}$
Lead Numb	Summary	Organisation Name		Code	Name			Date 🔍	summary		Contact	
1000	Lisa interested in new pr	Kangan Education Unit (		1000	Kangan Education	Unit (CA		06 May 11	Call Sonja re outstanding	j bill.	Sonja Flint	
1001	Show new computer pr	GV Productions		118.07				20 Mar 08	Sonja very happy with qu	ote and would lik	Sonja Flint	
1003	Interested in Secondary	Highstone High (AUST)		1001	Highstone High (/	บราว		10 Mar 08	Sent Email on Conference	e details	Sonja Flint	
1004	Upgrading	Kangan Education Unit (		1001	Highstone High (	10)		03 Mar 08	Intro Call to mention Co	nference we are ru	Sonja Flint	
1006	Sales Org Lead also for	Sales Org (AUST)		1001	Highstone School	(UK)						
1007	None Org	None Org		1001	Highstone High (	AN)						
1008	Lead	GV Productions		1001	Highstone High (*	4Z)						
1009	Lead for ACE Drycleaner	Kangan Education Unit (						<u>.</u>		_		Þ
-					Highst	one High (AUST	) Balances		Highstone H		intact liet	
⊡• "\$"		my quotes					${}^{\flat} \leftarrow \rightarrow {}^{0}$		inglistone i			$ \leftrightarrow \rightarrow $
Number	Summary Organisat	tion Name	-	<unassign team=""></unassign>	Current			Name	Position	Email		Phone
1001.0001	Quote on N GV Produc	tions	_	Admin Team	30 Days			Christine Morr	rey Principal	christine@highstor	neh.gov.au	02 5478 8822
1004	Donation on e-Comput	ers		Nicky Team	90 Days			Sonja Flint	Computer Teacher	sonja.f@highstone	.gov.au	(02) 5478 8822
1005	Pledge on 8/ e-Comput	ers	_	Sales leam	120+ Days	44100.55						
1013	Upgrading p Kangan Ed	ucation Unit (AUST)		Service Team	Sub Total	44100.55						
1014	Quote for C Kangan Ed	ucation Unit (AUST)			Future							
1015	Quote for ne Kangan Ed	ucation Unit (AUST)			Total	44100.55						
1016	Repair System Kangan Ed	lucation Unit (AUST)										
1026	Software for Kangan Ed	lucation Unit (AUST)										
⊡- "\$"	Tear	n Sales Quotes		Users	ŀ	lighstone High (/	aust) $[]_2 \leftarrow  ightarrow c_{\odot}$		Highstone H	igh (AUST) ope	en quote:	$\bigcirc^{*} \leftarrow \rightarrow \checkmark_{\bigcirc}$
User <ar< td=""><td>ıy&gt;</td><td></td><td>~</td><td>Team <any> ~</any></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></ar<>	ıy>		~	Team <any> ~</any>								
Number S	ummary	User Organisati	on	<unassign user=""></unassign>								
1001.0001 Q	uote on Notebook for Video	Pr SUPER GV Producti	ons	"All - Full access								
1004 D	onation on 8/02/2000 12:56:0	01 SUPER e-Compute	s	*All - Read and Add *All - Read and Change	1116	110 11	ONE					
1005 P	ledge on 8/02/2000 12:57:00 l	PM SUPER e-Compute	s	*All - Read Only	I mit	n a l	ONE					
1011 B	ooking for Expo Camp on Ne	ew HiTech Com	puters	*Team - Full Access			)					
1012 B	ooking for Expo Camp on Ne	ew Target Com	puters	"Team - Read and Add								
1013 U	pgrading pc's	SUPER Kangan Edu	cation	*Team - Read and Chan								
1014 Q	uote for Conference on Prod	lu SUPER Kangan Edu	cation	Theam thead each							_	
Sales De	esk											

#### **Query Panel Parameters**

If the **Allow parameter dialog** property is ticked, then when the desktop is first loaded, a Parameters for Query window opens, allowing the user to enter any parameters set up in the source query:

GT Pa	arameters	for Query	×
Code	1001		
Restore defaults		ОК	Cancel

After the query has loaded, you can click the **Refresh** button (  $\bigcirc$  ) to change the parameters and re-load the query.

If **Allow parameter dialog** is not ticked, the query will load with the defaults specified for each parameter. To change the default parameters, double-click on the **Parameters** property to open the Parameters for Query window and enter new values.

iniy Q	Gotes	(Cum)	bulances	contacts	Properties		
					Name	Value	^
					Refresh		
Team Sal	as Quotes	Licerc	Image	Quotes	Update in real time	<b>v</b>	
ream San	es quotes	osers	mage	Quotes	Real time display delay (sec)	5	
					Base Class	CRMOrganisation	
Sales Des	k			(X) Close All	View	Organisation	
				0	Query	Organisation	
Highlight Colo	urs				Allow parameter dialog		
New	Chang	ged 👘	Overdue	Restore Defaults	Parameters	<double cha<="" click="" td="" to=""><td>nge parameters&gt;</td></double>	nge parameters>
					<		2
					Table Layout	Tile Format	Define Query
Ready				Des	ktop Layout 2 of 40		

Right-clicking on the header of one of the columns in a query opens a menu with options related to parameters:

- **Display Parameters** displays the current parameter settings in a pop-up window.
- Save Parameters saves the current parameter settings as the default.

• **Restore Default Parameters** – if new default parameter settings have been saved with the **Save Parameters** option, selecting this option reverts the default settings to the defaults set up in the query.

Code 1001 1001 1001 1001 1001	Name         Highstone Hig         Highstone Hig         Highstone Sch         Highstone Hig         Highstone Hig         Highstone Hig         Highstone Hig         Highstone Hig         Highstone Hig         Restore Default Parameters         Restore Default Parameters         Restore Default Parameters
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**Note:** If the **Allow parameter dialog** parameter is not ticked, the **Save Parameters** and **Restore Default Parameters** options are not available in the right-click menu.

## Desktop – Default Sorting on Views

You can now define a default sort order for views created with the Query Designer. On the new Sorting tab, you can add elements to sort the query by and set a sort order for each one. To make this easier, a new **View Columns** panel has been added to the toolbox on the right—this panel contains all elements that have already been added on the Data View tab.

व	View Builder		_ = ×
	$              \xleftarrow$		0. 1. 7
Name Organisation	O Description View Organisation	Q	Class so
Data View	Sorting	Preview	Data elements
Sort By code	Sort Order Nevest to Oldest		View Columns
			Permissions
Adding a new Data View		There are no Data Views	

## Desktop – Payment Selections Update

This release adds new features to the Payment Selections window:

- New **Payment Terms From** and **To** fields let you select payments based on a range of payment types.
- A new **Tree** dropdown lets you select a tree to display in a new panel on the right. You can use the check boxes on the new tree panel set the branches to select payments from.

GT				Pay	ment Selection	5		_ = ×
		A (	$\emptyset \vdash \leftarrow -$	$\rightarrow \rightarrow$				⊕ 🖪 🌶 & ∆ ?
Code			Q	On hold				
Supplie Branch Curreno Payment Supplier Unselecte Code 1015 2000	r selection criteria From 01 V AUD (Australian t terms 30 Days from Inv r selection by: Ocde r de zero and credit balance ed suppliers Name Holcim (New Zealand) Computer and Parts M	Dollars) voice Date Q e Alpha e suppliers Q Show	To 03 USD (US Dol Pay on Invoi zzzz children separ <u>Hide all</u> Select >>	ars)	Maximum amour 999,999,999 I nvoice Highest pay c 1/1/2 Spliers	nt to pay 19,999.99 Balance date 0.00	Tree Region-AUS Selection total	Select Branches
2001 2002 2003 2004 Date	Askey Computer Comp Real Homes Real Estat Freehills Toyota RJ Accountants Transaction Re	pone te eference	< <u>D</u> eselect Show <u>a</u> ll Payment	Date Amount	To Pay Selected	Child Alpha	Branch	
Addir	ng a new Payment Selecti	ion			TI	here is one Pay	ment Selection	

These new features are also available on the Clear Selection window:

бт			Clear Selection	
Clear all Clear and R Reset selection	eselect based on criteria ons that match this crite From	ria: Tree Regio	n-AUS V	Select Branches
Branch Currency	01 ~ AUD ~	03 USD	~ ~	I South Australia I Tasmania
Payment terms	30 Days from Invoice	Pay or	n Invoice Q	I♥ Victoria I♥ Western Australia I♥ Export/Import
Supplier		Clear	<u>C</u> ancel	<ul> <li>✓ Canada</li> <li>✓ New Zealand</li> </ul>

## **Security Improvements**

This release includes enhancements to system security.

**Note:** Recommended settings are detailed in the document "MYOB Greentree Security Recommendations", which has been updated for this release.

#### eModules – Password Updates

Password changes for users of all modules are now subject to the same controls as for Greentree users on Windows client and Browser client. Those controls are the **Advanced password management** and **Enforce password history** settings on the Account Settings tab of the General System Preferences window.

For Greentree users of eCRM, eRequisitions and eApprovals:

- The maximum login attempts, password age and lockout duration are controlled by the settings on the General System Preferences window.
- The **Locked out of eModules** check box on the CRM Preferences window has been replaced with **Allow access to eCRM**.
- The existing **Is account locked** setting on the General tab of the User Preferences form is used to manage lockouts.

For Contacts and Organisations using eService:

- Password age is now controlled by settings on the General System Preferences window mentioned above.
- As previously, lockouts have no time limit and the maximum number of login attempts is determined by the **Max Login Attempts** setting on the eModule Control window.

For HR employees using eHR, as previously, lockouts have no time limit and the maximum number of login attempts is determined by the **Max Login Attempts** setting on the eHR Module Control window.

For JC employees, eTimesheets lockouts, as previously, have no time limit and the maximum number of login attempts is determined by the **Max Login Attempts** setting on the eModule Control window.

Points to note:

- Messages for authentication failures have been generalised to "The user name or password is invalid" to minimise disclosure of information. Messages for authorisation failures such as "This Contact is not active" remain.
- Failed login attempts by a Greentree user on Windows client, Browser client and eModules will no longer be counted separately. When the total exceeds the threshold, the user will not be able to log in any way, and this will be shown on the **Is Account Locked** setting on the General tab of the User Preferences form.
- The upgrade process does not change user names or passwords, but it will lock the account of any Greentree user whose most recent eModules login attempt failed.
- The changes comprise the 2021.1.0 package, which is applied by Packman, and minor updates to eModules ASP files, which need to be applied manually.

#### File Upload Updates

This release tightens controls on uploading and saving file attachments.

Filenames are now altered to contain only the characters A-Z, a-z, 0-9, space and underscore—any other characters are replaced with an underscore. (The exception is a single period, which is allowed to provide the file extension).

A new **Restricted file extensions** field has been added to Attachments sections of the following windows:

- CRM System Options > Email/Attachments tab
- CRM Module Control > Main tab
- HR System Options > Email/Attachments tab
- Workflow Module Control > Other tab

б	T HR System Options _ 🗆 🗙										
	C 18	H 0	€	▣ ⊅ ℰ ⅆ ⊘							
General	Email/Atta	chments	STP	Payday							
Email											
Email Program	Internal			$\sim$							
Do not displ	ay full name in em	ail address									
User can cha	inge Email Send Fr	om field									
Attachments	Save A	ttachment Exte	rnally								
External Locatio	n										
No. of Subfolde	rs O										
Never delete	the source										
O Always delete the source file											
○ Warn before deleting the source file											
Restricted file ex	tensions exe;v	/bs;scr;com;bat									
•											

This field contains a list of file extensions, separate by semicolons. Users will not be allowed to upload file attachments with extensions listed in this field. By default, the extensions exe, vbs, scr, com and bat are restricted, but you can edit this list to suit the needs of your organisation.

#### Support for OAuth 2 with Microsoft Exchange

MYOB Greentree now supports OAuth 2 authentication with Microsoft Exchange. If OAuth 2 is enabled on your Microsoft Exchange server, users can authenticate themselves using an OAuth 2 login instead of the usual username/password authentication.

On windows where users must enter email credentials, e.g. for CRM email filing or the eXchange EDI, the **Credentials** button opens an updated Email Credential Maintenance window, which now offers options for **Basic** or **OAuth2** authentication:

GT eXchang	e EDI Email Fetch Tasks	>
Task List Email Fetch Tasks and save them to serve	retrieve the contents and attachments o r directories, independent of document	f emails processing.
	e@example.com from Joe broggs	
Task Details		
Schedule	Default Schedule 🗸	Perform Now
Connection Email Address	jane.doe@example.com	Credentials
S GT En	ail Credential Maintenance	×
8 8		?
Authentication method		
S Basic		
O ontaining		Log <u>i</u> n
User name		Log <u>o</u> ut
Status Not logged in		<u>C</u> lose
On Completion Delete Proces	sed Emails	
<u>N</u> ew <u>D</u> elete	<u>R</u> evert <u>S</u> ave	Close

When **OAUth2** is selected, the user enters their username and clicks **Log in** to be redirected to a Microsoft signin page, where they can log in with their OAuth 2 details. Once the user is successfully authenticated, the OAuth login token is stored in the Greentree system. You can use the Token Management window (System > Utilities > Token Management) to check that users' OAuth tokens are kept up to date, and set email reminders for when the tokens are due to expire.

**Note:** More information on using OAuth 2 is available in the document "MYOB Greentree Security Recommendations", which has been updated for this release.

## Desktop – Auto Print Report Option

This release adds a new "Auto print" option to the **Output report to** dropdown on the following reports:

- Accounts Receivable
  - o Invoices
  - o Credit Notes
  - o Receipts
  - o Statements
- Accounts Payable > Payment Selections
  - o Print Remittances/Cheques
- Purchase Orders
  - o Purchase Order
- HR > Payroll
  - o Pay Slip
  - o ETP Payment Summary (AUST Only)
  - o Payment Summary (AUST Only)

This option generates reports for customers or suppliers whose delivery method is Print, and skips those whose delivery method is Email.

This option lets you generate print and email output separately using the same profile, for instance to re-run a report where there has been an error in printing but emails have been sent correctly.

### Desktop – User Interface Updates

#### Updates to the Explorer Window

The Explorer window has been updated to improve the layout of all controls (previously, some controls overlapped or were hidden by other elements of the window).

This release also adds a **Clear** button to the Explorer window—clicking this button returns the Explorer window to its original state.

	Explorer				_ □	$\times$
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The Explorer window also now supports dynamic properties, which previously could only be seen in the Report Writer and Query Designer.

### Window Menu

The ability to float forms in the Greentree Windows client has been restored. This is useful if you want to show some forms inside the main Greentree form on one monitor and additional forms outside the main form in a second monitor.

A popup menu built in to all MDI forms was removed by Jade in the 2018 upgrade included in the 2020.4.0 release. Equivalent functionality is now provided on the Window menu. The menu command **Window > Float** will float the active form. (The active form is the one whose caption appears in the main Greentree form's title bar—it is also shown with a tick on the list of forms at the bottom of the Window menu). To return a floating form to its original place in the main form, ensure it is the active window then use menu command **Window > Dock**.



### Updates to HR Employee Balances

The HR Employee Balances window now has **Show balance in hours** selected by default, so that it always shows meaningful data on opening, regardless of whether the employee calculates leave in weeks or days.

GT					Balances						×
Employee	PETERSK Peters, Ki	athy			As at 30 /	03 / 2018					
Show ba	lance in hours 🛛 🔿 S	how balance in da	ays 🕓	Show balaı	nce in weeks						
Trans Type	Description	Accrual Rule		Entitled	Current Ra	te A	ccrued	Accrued Value	Avg Hourly Rate	Not Entitled	
202	Annual Leave	Annual Leave		97.9452	\$0.	90 90	97.9452	-\$3,236.94	-\$33.05	0.0000	
203	Sick Leave	Sick Leave		200.0000	\$0.	00 20	00.000	\$2,840.00	\$14.20	0.0000	
204	Long Service Leave	Long Service Lea	ve	0.0000	\$0.	00	0.0000	\$0.00		0.0000	
205	Rostered Day Off	RDO		231.9981	\$0.	00 23	31.9981	\$3,809.70	\$16.42	0.0000	
208	PPL - KIT Day			0.0000	\$0.	00	0.0000	\$0.00		0.0000	
Earnings su Based on	mmary	Normal hours	s worked	🔿 Star	idard hours						
		Weekly	Hour	s Hourly	/ Rate						
Average f	for last 4 weeks	\$1,349.00	38.000	2 (	35.50	Based or	n 4 pays	(24/02/2018 - 2	23/03/2018)		
Average f	for last 52 weeks	\$1,356.15	37.730	3 S	35.94	Based or	n 52 pay	s (25/03/2017 -	23/03/2018)		
Day sum	mary	Week 1	Week	2 W	/eek 3	Week 4	A	verage	Rate		
										Close	

#### Active Only Option for HR Employee Maintenance

A new **Active Employees Only** check box has been added to the HR Employee Maintenance window. When this box is ticked, the window will display only those employees whose **Status** is set to "Active".

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CV Inve	olvement Medical	Org Chart	Development	Key Dates Eve	nts Security	Custom	Notes	
Main De	efaults Options	Tax Config	Payroll Balance	e Tracking Other	Transactions	Positions	Functions	ACTIVE
Title	Mrs 🗸 Gender	Female	✓ Status	Active	~	•		Attachments
Usual Name	Kathy Peters		Phone	(00) 0000 0000				<u>P</u> ay Now
Salutation	Kathy		A/H Phone	(00) 0000 0000		_		Process Accruals

The **Active Employees Only** check box is also available on the HR Employee Maintenance – Payroll and HR Employee Maintenance – Human Resources windows.

### eDocs – User Interface Updates

#### PO Ref Link to Suppliers

A **PO Ref** column is now available on the eDocs > Transactions tab of the Supplier Maintenance window. This column contains the value of the **PO Ref** field from the related eDoc AP Invoice:



#### Update to Supplier Line Mapping

This release adds a **Load Table** button to the eDocs > Line Mapping tab on the Supplier Maintenance window. Where a supplier has a large number of mappings set up, this tab can take a long time to load. To avoid this, when there are more than 500 mappings set up, the table is not loaded until the user clicks the **Load Table** button. Where there are less than 500 mappings, the table loads automatically as usual and the **Load Table** button is disabled.

GT				Suppli	er Maintenand	ce					×
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			D	isplayed curr	ency 🕖 Forei	gn 💿 Loca	1				
Main Defaults	Integr	ation Cash/Bank	ting Transaction	ns Custor	n eXchange	WebView	eDocs	Notes	Related	Analysis	
		Transactions					Setu	ip			Release/alter holds
											Apply transactions
Supplier Type AP		Q Supplie	r Type PO		Q Default Acti	vity Code	Q				
Email Addres	COC	Ontions	Line Mar	ning	Field Com	version Rules		Invoice N	lumber Val	idation	Create invoice
Lindi Hadi C		options	2.110 1110	ping	There com					laation	Create standing invoice
Constraite Heat	Type So	rape Options									Create journal
Load Table											Create credit note
Match Text	ype	Company	Code	Descriptio	n	Nar	ration	Activit	у	Inactive	Create naument
13 Concrete Agg	NS		Duty	Import Du	y						Create payment
91405557	IN		SBLIVESCARD	Creative La	bs Sound Blaste	r					Create purchase order
PAP5 Mixed	IN		ACER17LCD	Acer 17° LO	D Monitor						Create standing order
	NS										

#### Deduct Withholding Tax on eDocs AP Invoices

A **Deduct withholding tax** option is now available for eDocs AP Invoices. This option defaults to ticked if the supplier is a withholding tax supplier, but can be unticked for invoices that are expense reimbursements. When an AP Invoice is created, this setting is carried through to the AP Invoice.

**Note:** Sites will need to update the A&A rule used for importing eDoc AP Invoices. The new rule is available from the Greentree FTP site, and accommodates the addition of the new **Deduct withholding tax** field on the eDoc AP Invoice. If the rule isn't updated, this will cause the import to fail with the error "6070 Parameter number mismatch shown" in the eDoc Script Run log.

## **Resolved Issues**

### Greentree Desktop

We've fixed these issues in Greentree Desktop:

- In some cases users were not able to login to a Test system after a registration pack was applied.
- The error message "An error has occurred (1035) String too long" could appear when creating or opening an AR Receipt.
- The error message "The form has previously unloaded" could appear when importing a file for Australian BSBs in External Bank Maintenance.
- The system could appear to freeze when selecting a Save to File task. This release adds a progress bar to the file-writing process that occurs on completion of a Save as File task.
- Tables containing positive and negative numbers would not be sorted correctly.
- When selecting **Send Table Contents to Clipboard** from a table, if the first cell in the first row was empty, data would be out of alignment in the exported file.
- The **Effective date** field was mis-aligned on the GL Account Tree Assignment window.
- Fields are now consistent in using commas as thousand separators, e.g. 1,234,567.89
- An issue preventing the correct display of the **Taxable Payments Report Required** field on the Country Maintenance form has been resolved.
- A change has been made to the AP Outstanding Invoices report so that it no longer shows suppliers who have only outstanding invoices due after the selected date.
- An issue has been resolved in maintenance of Customers and Suppliers for a country whose description exceeded 30 characters.
- This release fixes issues where a database lock would be held while the system was waiting for a user response:
  - When loading a record in SO Packing Slip Maintenance, if the customer was on stop credit, the message "This customer is on stop credit. Cancel packing slip?" would appear and the record would remain locked until the user makes a selection.
  - When viewing a record assigned to an inactive user, the message "The user assigned to this record is currently inactive. It has been re-assigned to BLANK", would appear and the record would remain locked until the user clicked OK.
  - When copying a sales order, if any of the lines were kitsets not held in stock, the user had to re-select components and the record would remain locked until they had done so.
  - The database would remain locked while running a SO Enquiry search.
- When printing documents, the printed output did not come out of the printer in the sort order that was specified when the print task was submitted.

- This release corrects revaluation calculations for fixed assets. When an asset set up with a calculation based on useful life is revalued or adjusted, the revaluation/adjustment is now based on the remaining useful life, not the full useful life.
- The BPM process now completes correctly when triggered from the API.
- It was not possible to create PO Receipts and AP Invoices for Purchase Orders containing JC Lines for closed jobs (in AP or from eDocs).
- On the Windows Designer, if multiple custom forms were created, when one of the forms was modified, the **Default** column on the Companies sub-tab would disappear.
- An error with the code 4 ("Object not found") could occur when changing lines in an AR Credit Note, if an A&A rule for AR Credit Notes was in place.
- When a transaction analysis code was edited or removed from an AP Invoice, the transaction analysis was correctly updated so that it was unallocated, but on recall the AP Invoice did not show the deleted transaction analysis code.
- An error with the code 1090 ("Attempted access via null object reference") could occur when saving a Job Card report on a Sub Job created from a CRM Quote.
- When an existing document was reopened or recalled and the Tax Type changed from I to E or E to I, the change was not saved.
- The Data Import Manager did not output all lines into the .error file when a line failed.
- Where the PO Line Item Expected Date is updated based on a change to the expected date on the header, this change is now retained when the order is reloaded.
- For employees where Annual Leave is calculated in weeks, leave requests can now span multiple pay periods.
- Users could be disconnected from Greentree and then be unable to log in again, if their connection was forced off or timed out.

### eDocs

We've fixed these issues in eDocs:

- A fix has been made so emails imported by eDocs tolerate Unicode characters in attachment names.
- Documents created using the Merge eDocs function displayed the message "Evaluation Only" at the top of each page.
- An error with the code 5028 ("Requested file directory not found") could occur when approving eDocs from the Approvals screen.