MYOB Greentree

2020.1.0 Release Notes

Date: 17/06/2020

Version 1.2

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Introduction

Release 2020.1.0 consists of enhancements to both Greentree Desktop and Greentree Browser.

In Greentree Desktop, we've made changes which enable:

- System administrators to automatically log users out and audit logins and log outs,
- You to customise two forms, and
- You to fix error in STP lodgements and resubmit them

In Greentree Browser, we've added a dropdown list to the Service Request and Call forms which you can use to assign a reseller. We've also modified the way in which Greentree populates the payroll transaction type and classification on timesheet lines entered in Greentree Browser

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

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Enhancements - Greentree Desktop

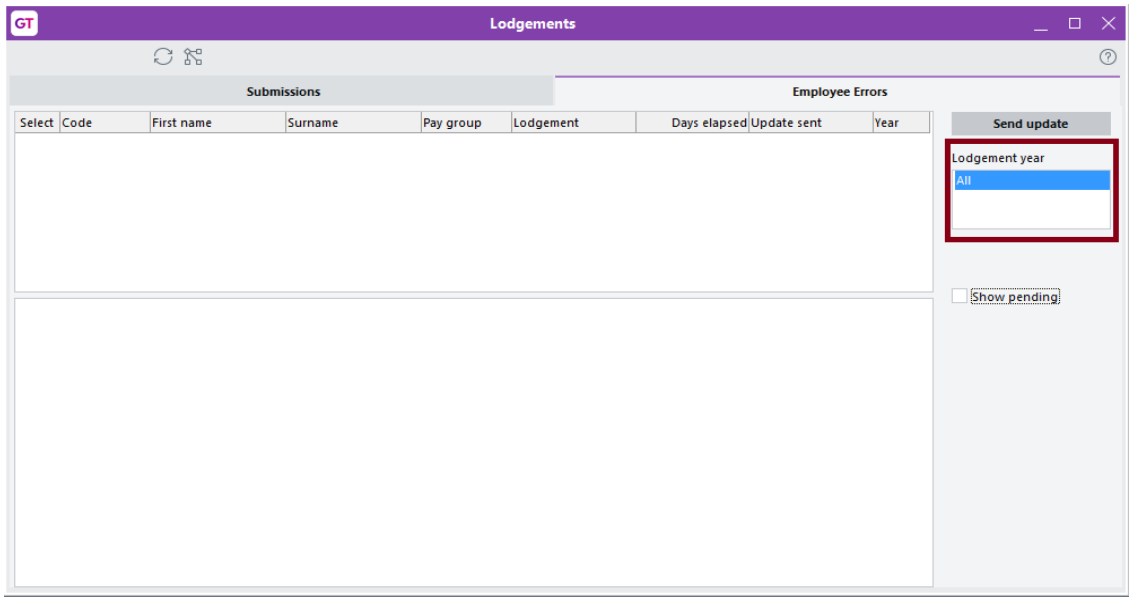
We've made these enhancements to Greentree Desktop:

- Submitting or Finalising STP Lodgement Errors That Cross Financial Years
- Add and Edit User Defined fields and Tree when entering a Serial/Lot item
- Automatically Log Out Users
- Auditing User Logins and Logouts
- Customising Forms

Submitting or Finalising STP Lodgement Errors That Cross Financial Years

You might have STP lodgements in a year that contain errors. However, you might not lodge or finalise the payments until the next financial year. In previous versions of Greentree Desktop, you couldn't lodge or finalise a payment because needed to be in same financial year as one in which error occurred to do it.

On the **Employee Errors** tab of the Lodgements form, errors for individual years display on own line. You can fix errors and resubmit the lodgements. Can select option from **Lodgement year** list to filter.



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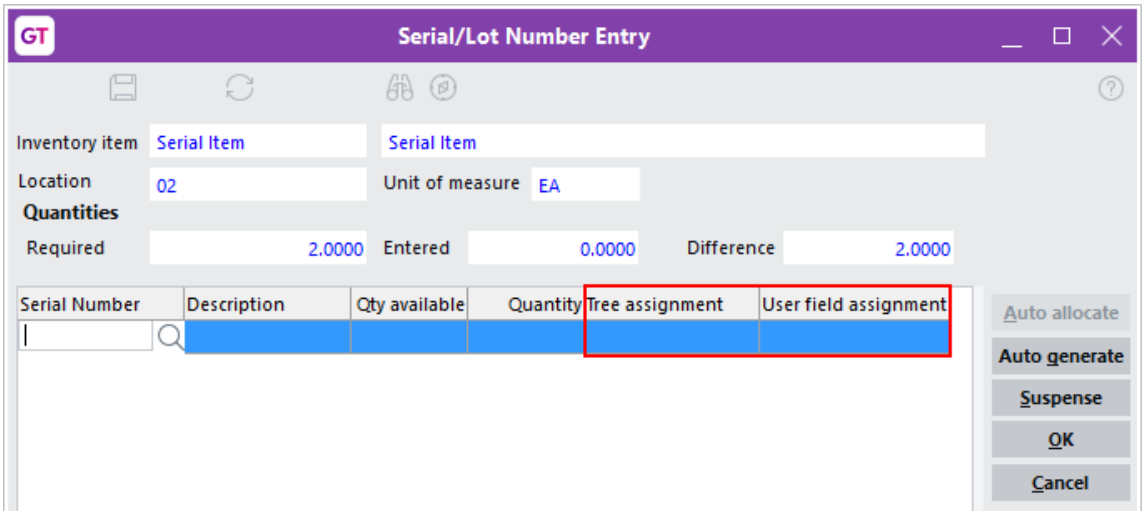
Add and Edit User Defined Fields and Trees When Entering a Serial/Lot

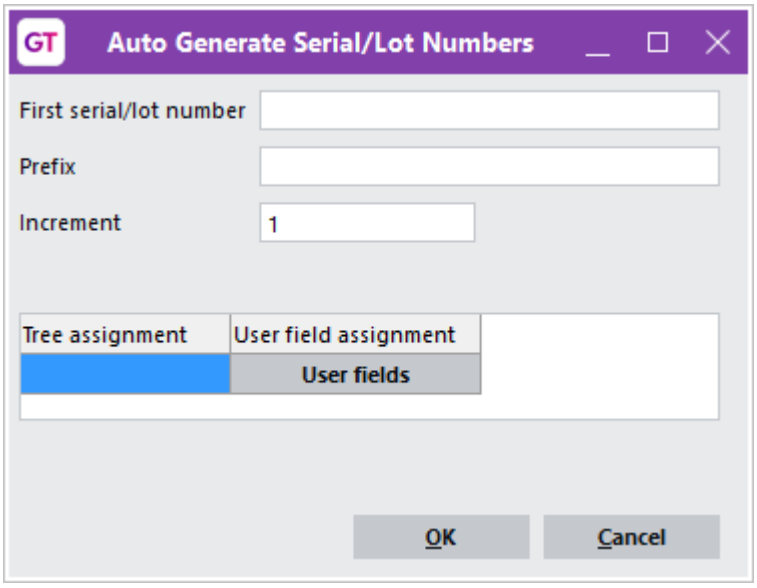
You can now add and edit trees and user-defined fields when entering a serial/lot using the Serial/Lot Number Entry form.

Note: This function is only available for increasing transaction types such as positive inventory adjustments, purchase orders, PO receipts, and AP invoices. You can't use it with negative inventory adjustments, sales orders, packing slips, AR invoices, or AR credit notes.

When you, for example, create a receipt or invoice for a purchase order that contains one or more serial items, the Serial/Lot Entry form displays. You'll see two new columns in the table on the form: **Tree assignment** and **User field assignment**. Serial/Lot Items can be assigned to a Tree or UDF directly on this form..



..or alternately, on selecting the **Auto generate** button, the Auto Generate Serial/Lot Numbers form displays allowing you to assign a Tree and/or UDF to all of the auto generated lines.



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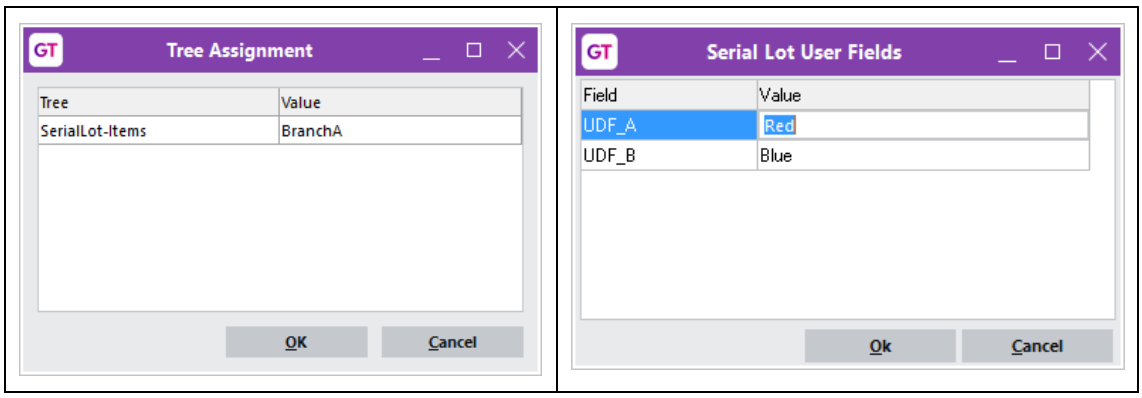
You can double click in the **Tree Assignment** or **User field assignment** fields on the Serial/Lot number form to edit any Tree or UDF selections.



When a serial/lot item is sent to suspense, the option to assign a tree branch or UDF is not available until you do a serial/lot suspense allocation.

Depending on user privileges, you can drill down to the Serial/Lot Entry form from the PO receipt to check or edit the tree and UDF assignments.

Once a purchase order is invoiced, drilldown is read only, however you can make any change via the Inventory Serial Lot Maintenance form.

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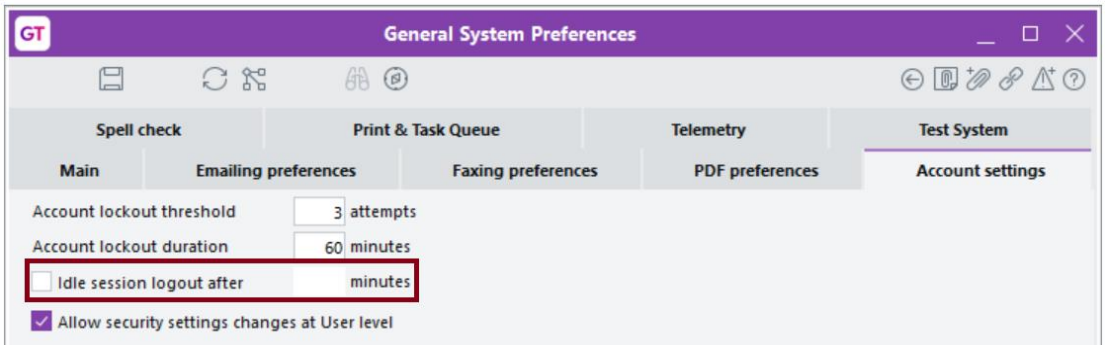
Automatically Log Out Users

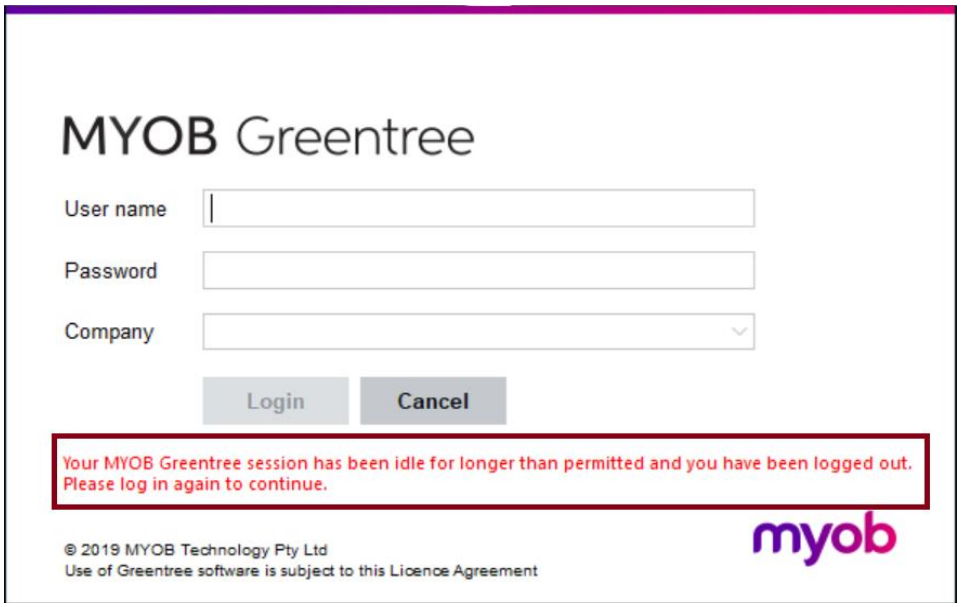
System administrators can now configure Greentree Desktop to log users out of the application when they've been inactive for a period. Doing this frees up Greentree Desktop licences so other users can log in and use those licenses. It also increases the security of the application if a user has left their desk unattended and not locked their workstation.

Configure the period using the **Idle session logout after x minutes** option on the **Account Settings** tab of the General System Preferences form.



Select the option and enter the number of minutes a user can be idle before Greentree Desktop logs them out. The default is 30 minutes. The field for the number of minutes cannot be empty, negative, or zero.

After you're logged out, Greentree Desktop's login screen displays with this message:



Users lose unsaved work when Greentree Desktop logs them out. However, if you're running a process that takes some time — for example, generating a report, creating pays, or generating receipts or bank reconciliations — Greentree Desktop starts your idle time from the moment the process completes.

Note: This feature does not apply to Greentree Browser. Sessions for *super* users do not time out.

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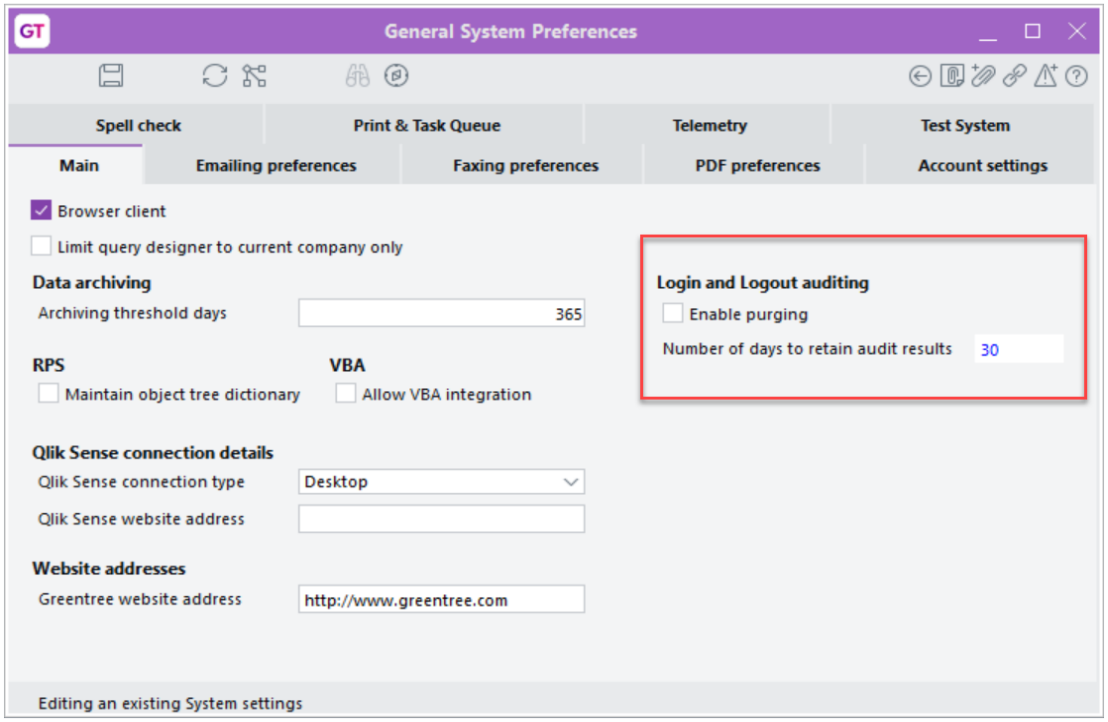
Automatically Purging Login and Logout Audits

Greentree Desktop logs user logins and log outs. If you find that those logs are becoming too large, Greentree Desktop can automatically purge the logs. To do that, select the **Enable purging** option on the **Main** tab of the General System Preferences form.



By default, Greentree Desktop retains the audit logs for 30 days. You can enter another number in the **Number of days to retain audit results** field.

Once set, you can run this via System > Utilities > System scripts, or schedule this as a task in System > Task Scheduler.

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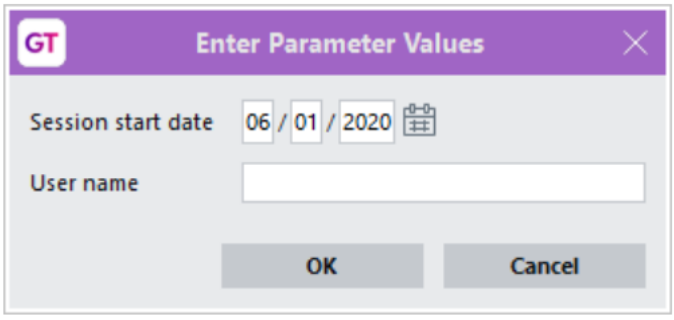
Auditing User Logins and Logouts

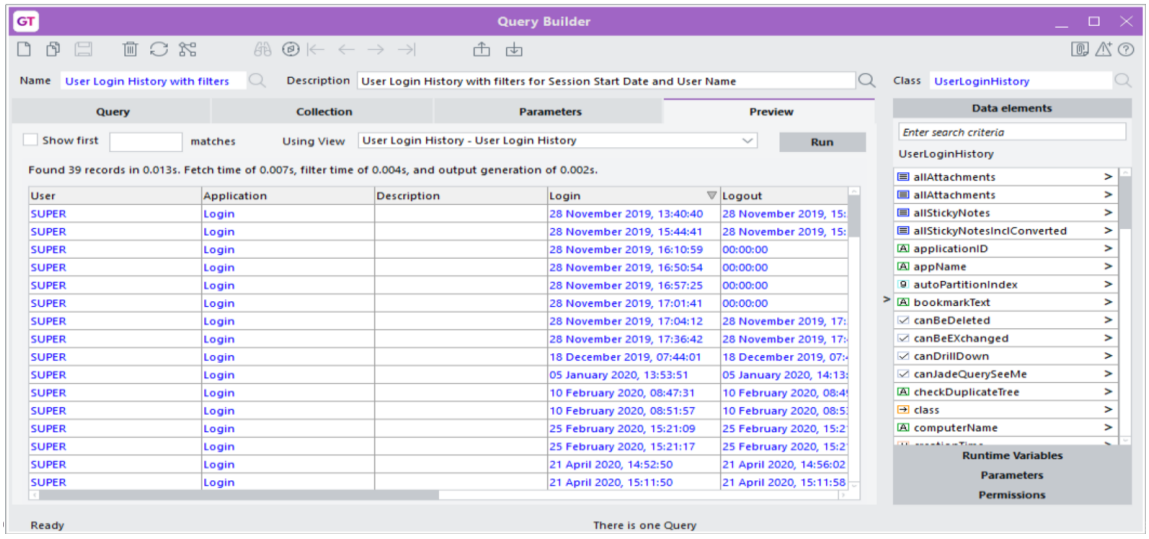
System administrators can now more easily report on user logins to and logouts from Greentree Desktop. To enable that, we've created the *User Login History* query and data view to Query Designer. This enables an administrator to see which users have successfully logged into and logged out of Greentree Desktop. Administrators can also see if there were failed attempts to log in.

Note: You'll need to download the query and view from the Greentree FTP site. Then, import the query and view into Greentree Desktop.

To run the query, open the Query Builder form and run the query *User Login History*. Greentree Desktop prompts you for a date from which to generate a report and, optionally, the name of the user to report on.



If you don't enter a user name, Greentree Desktop runs the report for all users in the company that you're currently logged into.



The query returns this information:

- The person's Greentree Desktop user name.
- Whether the user logged into or logged out of Greentree Desktop.
- The date and time at which the user logged in.
- The date and time at which the user logged out.
- The number of minutes the user was logged into Greentree Desktop.

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Customising Forms

You can now customise:

- The General Ledger Posting Period Maintenance form (under **System > General Ledger > Posting Period Maintenance**). The form now calls the *eventFormAssignDatabaseChange* event when you save changes.
- The About form (under **Help > About**). The form now calls the *eventFormLoad* event when it displays.

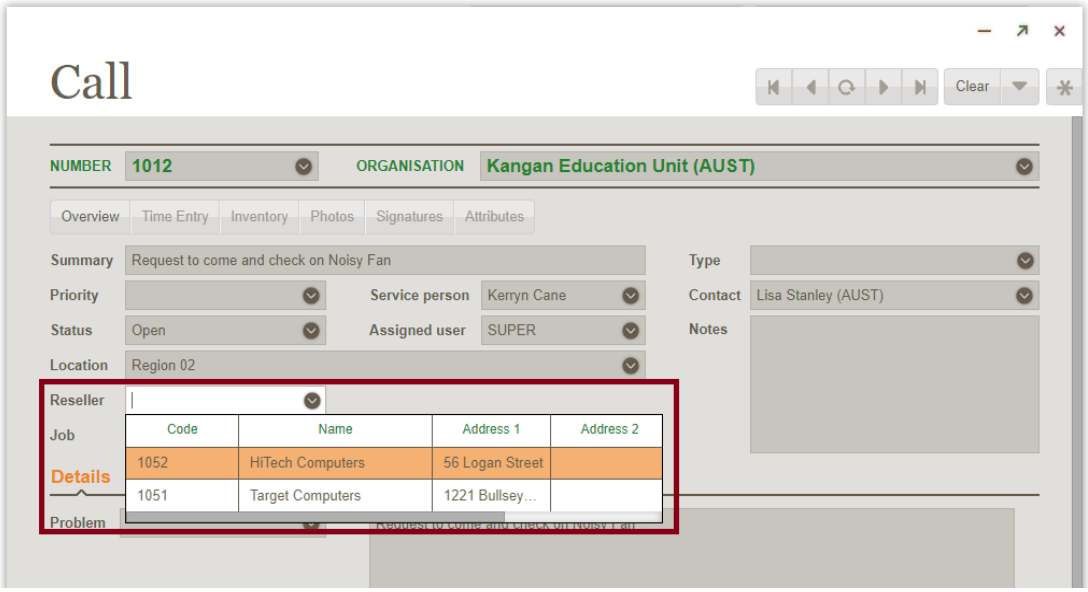
Enhancements - Greentree Browser

We've made these enhancements to Greentree Browser:

- Reseller List Added to Sales Order and Call Forms
- Mapping Job Activity Codes to Payroll Codes

Reseller List Added to Sales Order and Call Forms

You can now specify a reseller on service requests and calls in Greentree Browser. Do this by selecting a company from the **Reseller** list on the **Overview** tab of either form.



If the organisation has a default reseller, that reseller automatically populates the **Reseller** field when you create a call or service request for that organisation.

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Mapping Job Activity Codes to Payroll Codes

We've modified the way in which Greentree populates the payroll transaction type and classification on timesheet lines entered in Greentree Browser. Greentree determines the default values for these fields from user-defined timesheet payroll job mappings in Greentree Desktop. It then applies the defaults when the user selects a job, activity code, or work centre on a new line.

Previously, the defaults were not applied if the transaction type or classification was manually entered or if the line had been saved. Now, the defaults are applied when the user changes the job, activity, or work centre. When you change key fields, defaults are re-determined and applied to dependent fields.

While most users of Greentree Browser do not see the **PR Tran Type** and **Classification** fields, this change fixes a bug that left those fields out of sync when the job, activity code, or work centre was changed on a saved line. Other users who see those columns will see their values change and may need to override them if, for example, the original activity code was wrong but the transaction type was correct.

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Enhancements - eDocs

We've made these enhancements to eDocs:

- Remember Split position in eDocs forms
- eDoc Invoice number validation

Remember Split Position in eDocs Forms

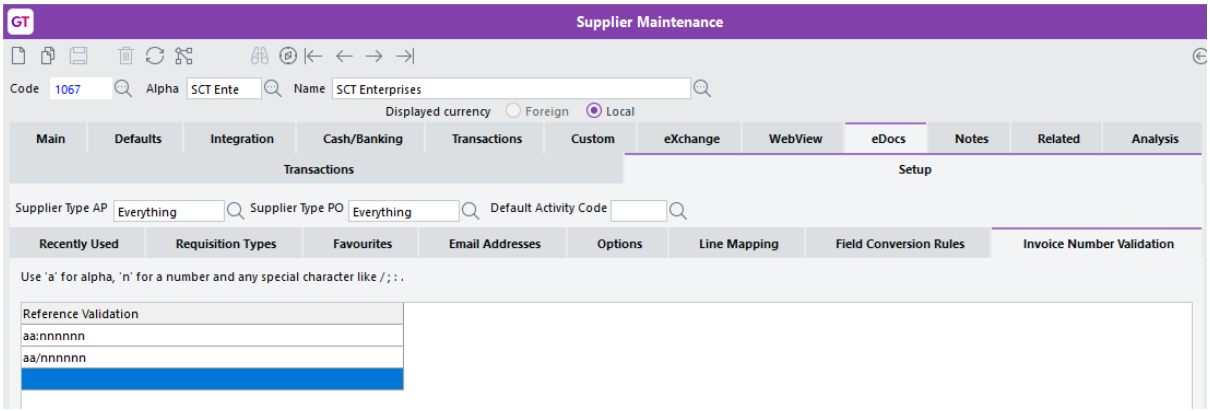
When you process an eDocs transaction, you can resize the portions of the form that contain the transaction details and which display a PDF. To enable eDocs to retain the size and position of a form which you've resized, we've added the:

- **Remember form size and position** option to the Workflow preferences.
- **Open eDoc Transactions form maximised** option to the eDoc preferences.

The size and position of forms are retained after you log out of eDocs.

eDoc Invoice number validation

We have added a new tab to the AP Supplier Maintenance form for **Invoice Number Validation** and provided a new method that can be added to the eDoc Approval and Alert rule to handle this validation process.



When a reference validation is set, the scraped and converted invoice reference is checked by the amended eDoc Approval and Alert rule to ensure it matches any of the specified formats. If true, the invoice proceeds through as normal. If false, the action will look to the 'If Conditions not Met' section of the rule to determine what should happen.

Where there is no Invoice Number Validation set, this then passes through the check as if it were true.

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Bug Fixes - Greentree Desktop

We've fixed these issues in Greentree Desktop:

Alerts and Approvals

- Approvals and Alerts rules now support the use of classes and properties with names of up to 100 characters (this is a limit imposed by JADE).
- Rules based on HRPerson or HRTSEmployee classes now fire when a user changes a record in Greentree Browser.

CRM

- The **Job Margin or Markup** section on the **Quotes** subtab of the **Sales** tab on the CRM Module Control form is now visible.
- Global search now returns all matching records when run against a CRM service request.

Note: You must do a full re-index to use this fix.

eRequisitions

- You cannot enter a general ledger line for a non-quantity general ledger account.
- On the **Custom** tab, you can now look up and select a requisition tree branch.
- The quantity defaults to *1* when you move out of the **Price** field if a GL account is not a quantity account or if a GL account can have a quantity of *0*.
- When you create an eRequisition (before saving the requisition), you can now add a user defined field value **and** a tree branch.

Fixed Assets

- When doing a fixed assets transfer, you no longer need to open historical posting periods for all of the asset's transactions.
- Depreciation is no longer calculated on assets with no depreciation when performing a second or subsequent transfer.

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FREE

- When importing a Job Cost GL Sales Adjustment transaction that includes a Quad Accounting entry using the gtJCSalesAdjustGLLine function, the transaction is now successfully imported and the Quad Accounting entry now appears in the GL batch edit listing.
- The FREE CRM Add-in (gtCRMFree.xla) now works with Microsoft Office 365.
- The gtPOPurchaseOrderINLine function now enables you to add an inventory transaction tree to any inventory transaction.

HR

- If there are two employees with the same name in your organisation, an infinite loop no longer occurs when you try to select the menu item **HR > System > Utilities > Create Mobile Timesheet Employee**. You can now access the menu item.

HR Payroll

- We've fixed a problem where the **Timesheet Payroll Job Mapping** item under **HR > System > Payroll** was not visible even though the customer was licensed to use it.
- Response Code 500 'Internal Server Error' is no longer returned if an invalid STP onboarding declaration date exists. Instead, a warning displays if the onboarding date is invalid.
- Duplicate STP lodgements are no longer sent from Greentree Desktop.

Job Cost

- When you select a job on the Plant Charges Entry form, the correct work centre now defaults to the job.

Purchase Orders

- When a user with *Team* privileges logs into Greentree Desktop, details of inactive suppliers on the Purchase Order Entry and Requisition Entry forms no longer display.
- If Advanced Invoicing is enabled, received shipments generated from a purchase order that have an AP invoice applied now have the status *Partially Invoiced/Invoiced*.

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Workflow

- *Error # 14051 – Invalid Table row* no longer occurs when a user has a Workflow Desktop with the Service Request panel open, and another user adds or modifies a service request.
- Users can now only view the attachments associated with the modules to which they have permission to access.

Various Fixes

- Error 1090 no longer occurs when you try to connect Greentree Desktop with an external system via Microsoft Query using an ODBC connection.
- Greentree Desktop no longer hangs when you try to create a mobile timesheet employee who has the same name as an existing employee.
- The Data Import Manager now recognises the **Credit Limit Exceeded** setting when importing sales orders.
- We've fixed a problem that caused scheduled tasks run using the Print and Task queue — for example, backup, document rules, system scripts — to fail on some sites that packed up from Greentree version 2019.4.0 to version 2019.5.0.
- Exceptions no longer occur when you enter criteria in search fields that support Enterprise Search.
- Quantity break discounts are no longer applied if discounts are set to *0* when importing sales orders using EDI.
- After renaming columns in Explorer and saving your changes, the columns now have the correct headings.
- Error *14011 Method: JSTaskScheduleForm:PopulateTaskList(1498)* no longer displays when you try to access the Task Scheduler.
- Inverses are now updated when recalculating averages on the Reporting Currency Rates form if the **Automatically maintain inverses** is selected on the Currency Exchange Rate Maintenance form.
- The system script *reassign users of saved selection reports* now displays saved selections for the user who created the saved selections. You can now change the user from the original user to another user.
- The IN Stocktake Count Variances Report no longer returns error 1090 when you select it from the **Reports** menu.
- If hotprinting is disabled and Autoscan is being used, when you create an AP invoice the report selection form is no longer hidden behind the AP invoice form.
- *Error 1310* no longer occurs when packing Greentree to version 2019.5.0.

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Bug Fixes - Greentree Browser

We've fixed these issues in Greentree Browser:

- Lines entered on a sales quote no longer end up in a different sequence when you save or refresh the quote.
- When the task to rebuild Greentree Browser screens is run, an exception with the message *Cannot change current company to null* no longer occurs.
- Greentree Browser uses the current date on your computer, rather than the date of the server on which Greentree Browser is running, when you create these transactions:
    - Sales orders
    - Disbursements
    - Appointments
    - Communications
    - Followups
    - Leads
    - Pricing & Availability
- The Payroll transaction type is available for employees, who have Mobile Employee Maintenance permissions, when they enter or update timesheets in Greentree Browser.
- Browser-only employees can now view their employee records if the record has an Instant Alert.
- When you generate a CRM quote with a date ending in the year 2020, the PDF of the quote is now sent by email.
- Job activity codes now map correctly to payroll codes when a user submits a Browser timesheet for approval.

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Bug Fixes - eDocs

We've fixed these issues in eDocs:

- You can now select the subcode on eDocs AP invoice general ledger lines without double clicking the line.
- If you select a PO shipment or a receipt for a PO shipment on an eDoc AP invoice, the status of the PO shipment or receipt from PO shipment on the AP invoice now updates to invoiced or partially invoiced.
- Error *14049 Invalid number of rows set for Table* no longer occurs when you open the AP Supplier Maintenance form and the option **Only Display Open** is selected on the **Transactions** tab. The error only occurred if a supplier had over 32,0000 AP invoices.
- On AP invoices, the unit of measure shown is from the purchase order when you're matching inventory lines to purchase order lines.

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Bug Fixes - WebView

We've fixed these issues in WebView:

- When you **Add from Library** to add an attachment from the Document Library, the Documents Library form now displays rather than the Published Reports form.
- Error 1310 no longer displays when you deselect the **Allow WebView Access** option on the **Webview** tab of the User Maintenance form.

Account group maintenance options are now respected when you export reports. Users in an account group are no longer emailed PDF files and Excel spreadsheets when they don't have permissions to view published reports.

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