

MYOB Greentree



Release Notes

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Version Information

Release 2018.2.0 contains several enhancements to MYOB Greentree Desktop and MYOB Greentree Browser.

In Greentree Desktop, you can now move user-defined fields on a form you're customising in Windows Designer. We've increased the quantity or hours you can enter in timesheets for Calls and Service Requests. We've also made changes to Australian tax reporting for payments made to grant recipients.

In Greentree Browser, we've increased the quantity or hours you can enter in timesheets for Calls and Service Requests. We've changed the security model around access to the Pricing & Availability module and around access to HR leave requests.

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

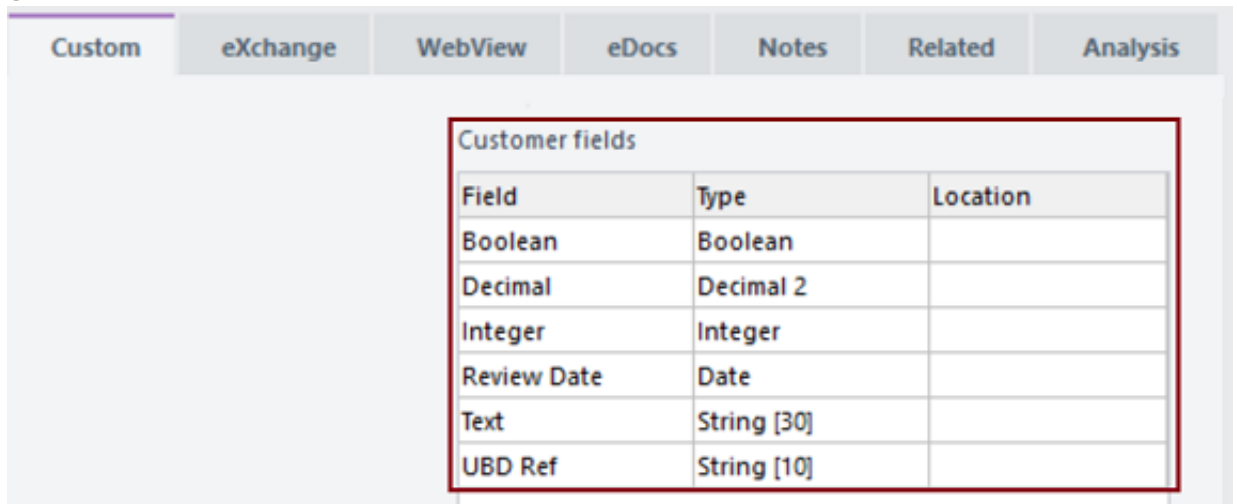
Customisation

Greentree Desktop - Customising User-Defined Fields in Windows Designer

When customising a form with [Windows Designer](#), you can now move user-defined fields (UDFs) to *any* location on a form ? whether on the current tab, or to another tab. You can also customise the properties of UDFs ? for example, to make them read-only or mandatory.

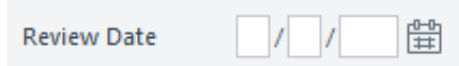
To customise a UDF:

1. On the Windows Designer form, select a customisation.
Note: Click the **Customised** option to display only customised forms.
2. Open the customisation.
3. Find the list of the form's UDFs. This is usually in a table on the form's **Custom** tab. The table contains a row for each UDF.



Field	Type	Location
Boolean	Boolean	
Decimal	Decimal 2	
Integer	Integer	
Review Date	Date	
Text	String [30]	
UBD Ref	String [10]	

4. Drag a UDF from the table to where you want it to appear on the form. This creates controls for the UDF on the form. For example, moving the **Review Date** UDF creates a date control, along with its label:



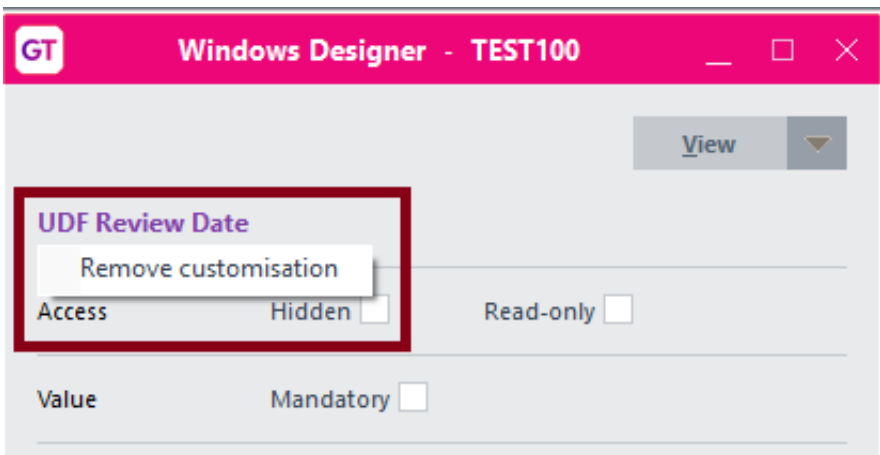
5. [Change the UDF's properties](#) if necessary ? for example, modify the UDF's position, size, or styling; or make it mandatory.
6. Save the customisation.
7. Click **View** in the Properties pane to review the customisation.

Note: When the form is in use, the fields that you moved don't appear in the table listing UDFs on the **Custom** tab.

To find a UDF that you've moved, open the customisation in Windows Designer and click the **Custom** tab. Then, click the link in the **Location** column of the table to jump to the UDF:

Inventory item fields		
Field	Type	Location
01 - Image URL	String [100]	
02 - Link URL	String [100]	
Expiry Date	Date	
Manager	String [10]	Sheet Enquiry
Start Date	String [10]	
Type	String [10]	

To return a UDF to the table, open the customisation in Windows Designer. Click the name of the form in the **Properties** pane, and then click **Remove customisation** in the menu that displays:



Customising UDFs on Forms Used by Multiple Companies

If you have the same UDFs set up on forms used by two or more companies in your environment, those UDFs appear on the forms for *all* companies. Windows Designer treats two fields with the same name and of the type in the same way.

If you have different fields across companies, you must check the customisation more carefully. When a customised form is in use, it only displays the fields relevant to the user's *current company*.

When editing the form, the table on the **Custom** tab displays fields for the company you're logged into, plus a row for each UDF you have moved that *isn't* used by that company. You must log in to different companies if you want to move UDFs used only by those companies.

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

eDocs - Issues Fixed in Release 2018.2.0

We've fixed these issues:

- When you approve an eDocs Expense Claim with an approval code that has been manually assigned, the **Approved** and **Not Approved** columns of the Workflow Desk panel now correctly update.
 - Generating an AP Invoice from an eDoc no longer creates an invoice with the **Deduct withholding tax** option selected for suppliers who have a Withholding Tax Exemption period set.
 - When viewing an eDoc in split screen layout, buttons and selection fields in the footer section are no longer distorted.
 - If an expense claim has no line items, you can now move back to the **Main** tab on the Expense Claim form after clicking on the **System** tab. The form no longer freezes.
 - We've increased the speed of loading line items on the **Requisition** tab of the Requisition Type Maintenance form after you perform a search.
 - AP Credit Notes no longer default to the AP Invoice transaction type, as this reduced (rather than increased) the stock. As well, clicking the **Advance** button on the form no longer opens the Schema Inspector.
 - When you drill down to a job or a customer from the Job Enquiry form, the **Summary by Period** field is no longer blank.
 - You can now create an AP invoice for an eDoc when you select the JC line on the **Purchase Order** tab and the status of the JC job is *Closed* or *Finalised*.
 - The **Search eDocs** button has been put back on the **Transaction Selection** tab of the CM Statement Entry form.
 - When automatically matching a line based on date and amount, eDocs now considers the reference if there is more than one invoice with the same date and amount.
 - The **Value** and **Currency** fields on the Header Line form for eDoc Credit Card are now read only.
 - We've updated the version of the Aspose email DLL file to fix a memory leak that occurred when eDocs accessed mailboxes at a customer site.
- Reference:
 - Type: Bug
 - Release version: 2018.2.0

HR

Greentree Browser - Changed Permissions for Accessing the Leave Requests Panel

Your site no longer needs CRM Basics to access **HR Leave Requests** on the **Approvals** panel if you're using the HR module but don't have Approvals enabled and are using single level browser approvals.

Note: Sites with Approvals enabled are unchanged.

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

Inventory

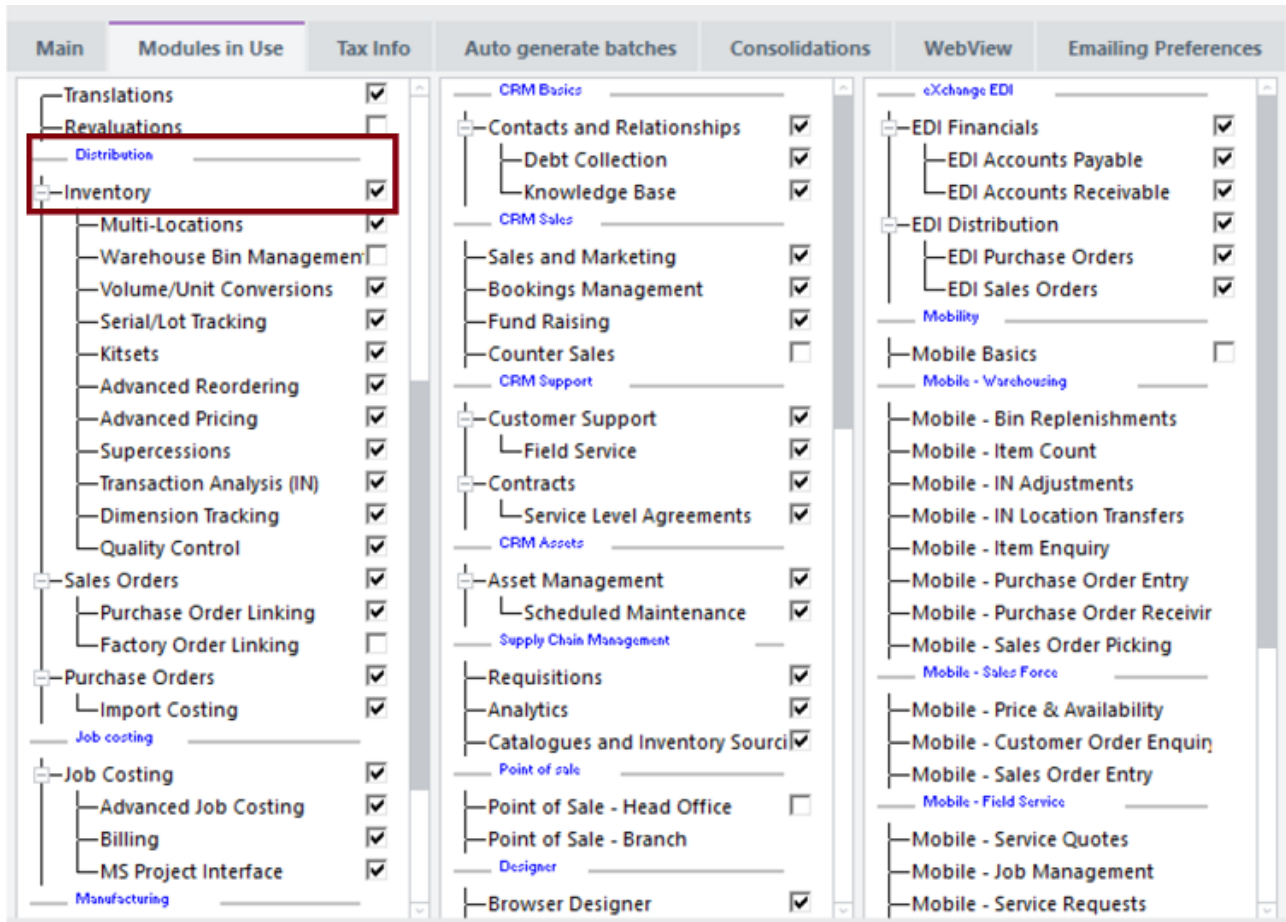
Greentree Browser - Updated Permissions for Pricing & Availability

We've updated the permissions that users need to access the Pricing & Availability module in Greentree Browser. To get access to Pricing & Availability:

- The user's *company* must be licensed to use the Greentree Inventory module, **and**
- The *user* must have access to one of:
 - Browser Distribution Suite, **or**
 - Browser Client Enquiry, **or**

- Browser Client Sales.

To confirm that the company has access to the Inventory module, select **System > System Setup > Company Maintenance**. Then, click the **Modules in Use** tab and find **Inventory** in the left pane of the form.



To confirm or grant access to users, select **File > Preferences**, click the **Access** tab, and then click the **Suite** sub tab.

Company		Suite			
Windows Client (Concurrent user licence)		Browser Client (Named user licence)			
Module suite (Licence count)		Allocated		Allocated	Unallocated
CRM Basics (120)	<input checked="" type="checkbox"/>	76	<input checked="" type="checkbox"/>	43	77
CRM Sales (120)	<input checked="" type="checkbox"/>	73	<input checked="" type="checkbox"/>	40	80
CRM Support (120)	<input checked="" type="checkbox"/>	70	<input checked="" type="checkbox"/>	38	82
Designer (unlimited)	<input checked="" type="checkbox"/>	84	<input checked="" type="checkbox"/>	37	unlimited
Distribution (120)	<input checked="" type="checkbox"/>	73	<input checked="" type="checkbox"/>	41	79
Exchange EDI (120)	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	4	116
Financials (120)	<input checked="" type="checkbox"/>	71	<input checked="" type="checkbox"/>	38	82
Global Finance (120)	<input checked="" type="checkbox"/>	6	<input checked="" type="checkbox"/>	5	115
Human Resources (120)	<input checked="" type="checkbox"/>	19	<input checked="" type="checkbox"/>	11	109
Job Cost (120)	<input checked="" type="checkbox"/>	54	<input checked="" type="checkbox"/>	42	78
Manufacturing (120)	<input checked="" type="checkbox"/>	26	<input checked="" type="checkbox"/>	6	114
Point of Sale (120)	<input checked="" type="checkbox"/>	16	<input checked="" type="checkbox"/>	1	119
Supply Chain Management (120)	<input checked="" type="checkbox"/>	23	<input checked="" type="checkbox"/>	81	39
Browser Client (Licence count)					
eDocs (unlimited)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	9	unlimited
Enquiry (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	6	114
Finance (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	6	114
HR (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	10	110
Reports and Documents (unlimited)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	unlimited
Requisitions (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	4	116
Sales (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	37	83
Service (120)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	37	83

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

Service & Support

Greentree Desktop - Increased the Quantity/Hours You Can Enter into Timesheets for Calls and Service Requests

You can now enter a larger value in the **Hours/Qty** field on the **Time Sheet** tab of the Service Request and Calls forms. Previously, you could only enter a values between -99.99 and 99.99 in that field.

You can now enter a range of values from -999999.99 to 999999.99. This accommodates customers who use the **Time Sheet** tab to track not just hours worked, but also values like kilometres which can require a quantity above 99.99.

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

Greentree Browser - Increased the Hours You Can Enter into Timesheets for Calls and Service Requests

You can now enter a range of values from -999999.99 to 999999.99 in the **Hours** field on the **Time Entry** tab of the Service Request and Calls forms. This accommodates customers who use the **Time Entry** tab to track not just hours worked, but also

other values like kilometres which can require a quantity above 99.99.

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

System Setup

Greentree Desktop - Upgraded Microsoft C++ Redistributable Package

Previous versions of Greentree Desktop relied upon the Microsoft Visual C++ 2008 runtime libraries. Microsoft no longer supports that version of the libraries, and we've updated Greentree Desktop to work with the Visual C++ 2013 runtime libraries.

To take advantage of this change, pack your site to Greentree version 2018.2.0. Once you've done that, you can uninstall the Microsoft Visual C++ 2008 runtime libraries by selecting **Microsoft Visual C++ 2008 Redistributable** in **Uninstall or change a program** under the Windows Control Panel.

Note: Before removing the Visual C++ 2008 runtime libraries, you should determine if any other software in your environment requires those libraries. Removing the old runtime libraries could cause other software to stop working.

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

WebView

WebView - Issues Fixed in Release 2018.2.0

We've fixed these issues:

- Drilling down to a transaction code from a browser report now only displays the value for the transaction code defined for the row in the report definition.
 - When you add an attachment by clicking the **Attachment Upload** link in the browser, the attachment is now added to the page on which you clicked the link. The attachment is no longer added to the parent page.
 - WebView Online Search is now URL encoded. You can perform searches that include account numbers with prefixes such as #.
 - Clicking the **Save to Library** button now updates the attachment line for an item in the library. WebView displays a form that you can use to choose the library in which to save the attachment.
 - We've fixed memory leaks in WebView that degraded the performance of the application.
 - When saving a new item to the Document or Report library and selecting the **All Users** permission on the item, the saved item is available to users based on their Document or Report library security settings.
 - The **Summary by Period** field is no longer blank when you drill down to a job or a customer from the Job Enquiry form.
 - We've resolved an issue in WebView Financial Reports that caused the **Account Description** and **Value** fields to be misaligned.
 - The **Description** field in GL Financial Reports now correctly aligns with data rows.
- Reference:
 - Type: Bug
 - Release version: 2018.2.0

Accounts Payable

Greentree Desktop - Australian Tax Reporting Changes

As part of Australian tax reporting requirements:

- Companies in the building and construction industry must report payments to contractors for services. This is an existing requirement.
- Government entities must report payments to recipients of grants. This is a new requirement.

We've changed to the AP Supplier Maintenance, AP Invoice Entry, and AP Credit Note Entry forms to comply with these requirements. We've also changed the AP Taxable Payment report.

Before You Begin

If you are paying contractors or grant recipients, you must select the **Taxable Payment report required** option on the **Main** tab of the AP Module Control form.

Supplier Maintenance Form

We've added the **Taxable Reporting** tab to the Supplier Maintenance form (found under **Data Entry > Accounts Payable > Supplier Maintenance**). We've moved the **Taxable Payments Reporting** options from the **Defaults** tab of the Supplier Maintenance form to the **Taxable Reporting** tab.

As well, we've added these options for payments that government entities make to grant recipients:

- **Grant recipient** - Select this option if the payee is receiving payments from a grant, and to report the payments in Greentree's Taxable Payments report.
- **Grant name** - Enter the name of the grant or the grant program from which the payee is receiving payments. This field is mandatory if you select the **Grant recipient** option.
- **Statement provided** - Select this option if the grant recipient has provided you with a [Statement by a supplier](#) form. The form indicates that the payee is not required to quote an ABN number.

The screenshot shows the 'Taxable Reporting' tab of the Supplier Maintenance form. The 'Main' tab is selected. The 'Contractor' checkbox is unchecked. The 'Grant recipient' checkbox is checked. Below it, the 'Grant name' text field is empty. The 'Statement provided' checkbox is checked. The 'Integration', 'Cash/Banking', 'Transactions', 'Custom', and 'eXchange' tabs are visible but not selected.

If you select the **Statement provided** option, Greentree adds an ABN that consists of zeroes to the file it generates to submit to the ATO when you run the [Taxable Payments report](#).

Invoice Entry and Credit Note Entry Forms

We've added the **Taxable Reporting** tab to the AP Invoice Entry and AP Credit Note Entry forms.

For:

- *Contractors*, the tab contains these options:
 - **Materials only** - Select this option to indicate that the invoice from the contractor contains no labour, or only incidental labour.
 - **Exclude** - Select this option to exclude the transaction from the Taxable Payments report.
- *Grant recipients*, the tab contains this option:
 - **Grant payment** - Select this option to include the payment in the Taxable Payments report.

Taxable Payments Report

The file that Greentree creates to submit to the ATO when you generate the Taxable Payment report now contains this information:

- A flag indicating the payment type (**P** for contractors, **G** for grant recipients).
- The date of the grant payment.
- The name of the grant or grant program.
- The supplier's email address.
- A flag indicating that the grant recipient provided you with a *Statement by a supplier*.
- Reference:
- Type: Enhancement
- Release version: 2018.2.0

Greentree Desktop - Issues Fixed in Release 2018.2.0

We've fixed these issues in Greentree Desktop:

Accounts Payable

- Greentree Desktop now correctly displays and exports AP Supplier Maintenance transactions to XML (which you can open in Microsoft Excel).
- On the **Transactions** tab of the AP Supplier Maintenance form, the contents of the **Tran** and **Reference** columns in the table no longer display as *Unapplied Transaction, UAPP*.
- *Error 14049* no longer occurs when displaying selected transactions in large collections on the **Transactions** tab of the AP Supplier Maintenance form
- The error *Invalid number of rows set for Table* no longer displays when you try to view all invoices for a supplier using **AP Supplier Maintenance > Transaction Enquiry**.
- When you import AP transactions using the Data Import Module, the values in the resulting AP credit note and in the general ledger are no longer out of balance.
- *Error 1210* no longer displays when you save an unprocessed AP payment that has the same **Selection Name** as another unprocessed payment.

Accounts Receivable

- If the option **Allow FREE to update last invoice number** is selected in AR Module Control, the invoice number range in **AR Module Control > Auto generate code > Invoice number** now increments correctly when you update AR invoices using the FREE gtARInvoice function.
- When you apply or unapply transactions on the Apply Transaction form, the credit transaction displays with the correct credit note number.

CRM

- Autocan no longer displays an error message when you try to save attachments to your workstation or to a folder on a network drive.
- When you apply background colours to tiles in the Workflow panel, Workflow Desktop icons are now visible and the colour you set displays on the tiles.
- HTML emails sent from the Debt Collection module now generate and display correctly.
- *Error 1000 (Invalid parameter type)* no longer displays when a Scheduled Rule exports a file that's used to interface with other systems.

- When an item on the Inventory Selling Price Maintenance form has rows for both local and foreign currency, the currency from the quote header (rather than the currency of the local price) updates into a CRM quote.

General Ledger

- We've fixed a problem in which Greentree was unable to process revaluations on a foreign currency bank account because there was no Cash Management Analysis code for the automated journal. In this situation, Greentree now uses the suspense analysis code from the Cash Management module control.

Human Resources

- You can now convert a JC employee to an HR employee if that person is also a Mobile Timesheet employee.
- *Error 1301* no longer occurs when copying a terminated employee with an empty **Bank Details** user defined field in their record.
- Greentree no longer displays the error message *User: XXXX had an error: Password must have a numeric and a special character in it* if you try to create mobile employees from HR employees when Advanced Password Management is in use. Greentree now automatically generates complex passwords that contain special characters (for example, and &).

Inventory

- If you have **Enquiry Access only** privileges on the Price & Availability, Price, Cost and View Inventory Items forms, drilling down on an inventory item takes you to the Enquiry form and not the Inventory Maintenance form.

Job Costing

- You can now search for addresses using the **Delivery address** field on the Job Maintenance form.

Mobility

- We've removed the **Pick List** option from the pop-up menu on the **Select Items to Pick** form in the Greentree Mobility app.
- The Mobility app no longer displays *An error has occurred (1011). The requested property is not defined for this object class* when you try to put an item on back order.

Various Fixes

- If you're using the 64-bit Connection Manager with a version of Greentree *before* 2018.1.0, you can now access the Greentree Desktop online help. Ensure that the help files (which have the extension .chm) are in the Greentree *bin64* folder.
- We've reinstated the colour coding of the icons in the Select Property window for queries that you run from Explorer.
- *Error 1310* no longer occurs when you add a new team to Greentree Desktop.
- We've included a fix that stops empty UTMonitorStatistics objects from being created. At some sites, a large number of those objects were being created and, while small, together they took up large amounts of disk space.
- When you select the **Mandatory** option for a form element in Windows Designer, users cannot to move away from that element without completing the mandatory fields on the live version of the form.
- Selecting **Send table contents to clipboard** in the JADE Query results table now copies the contents of the table to your clipboard.
- We've fixed an issue in which changes to the **HR Preferences** form under **File > Preferences** were not being saved.
- When you select the option **Allow manual linking of pays to leave requests** on the **Leave Planning** tab of HR Module Control, you can link pay details to an HR Leave Request by selecting either the **Allow manual linking of pays to leave requests** or the **Allow entry of pay details (not linked)** options.
- *Error 1300 - (Array index out of bounds)* no longer occurs when you open the Company Maintenance form for an inactive company.
- *Error 1215 - Persistent objects cannot reference transient objects* no longer occurs when the Greentree EDI processor attempts to process an outbound AR invoice.
- Reference:

- Type: Bug
- Release version: 2018.2.0

Analytics

Greentree Desktop - QlikView 12.10 Certification

MYOB Greentree is now certified for use with QlikView version 12.10. Greentree models and integrations will work with this version of QlikView.

You can find the installation files and release notes for Qlik 12.10 in this folder on the MYOB Greentree FTP site:

/Greentree/Greentree IQ/Installation Files/QV12.10 SR

- Reference:
- Type: Enhancement
- Release version: 2018.2.0

Browser Approvals

Greentree Browser - Issues Fixed in Release 2018.2.0

We've fixed these issues in Greentree Browser:

- When you add an organisation in Greentree Browser, the correct sales team (if there is one) for salespeople you add to the organisation now displays in the **Team** field on the **Details** tab.
 - Jobs with work centre plans now show the plan description for that job's work centres. Greentree Browser no longer displays descriptions from the work centre record.
 - Lines saved as timesheet lines in Greentree Desktop now display in Greentree Browser.
 - When entering Sales and Service Quote lines, the **Unit Price** remains unchanged when you click between the **Amount** and **Quantity** fields.
-
- Reference:
 - Type: Bug
 - Release version: 2018.2.0