

MYOB Greentree



Release Notes

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Version Information

Release 2019.5.0 consists of enhancements to both Greentree Desktop and Greentree Browser. In Greentree Desktop, service requests entered in Greentree Browser now update on the Mobile Employee Maintenance form. You can also now capture modified timestamps and users on HR timesheet lines. We've added a form that enables you to view teams and users, along with their access rights, across companies.

In Greentree Browser, we've added support for enquiry licenses to CRM forms and enhanced the display of leave balances. We've also improved the deployment process for Greentree Browser.

eDocs

eDocs - Validation for Scraped Documents

The Xtracta document scraping service doesn't always correctly scan a document. For example, the service might interpret a lowercase *l* as the number one (*1*). To avoid this problem, we've added the **Field Conversion Rules** tab to the Supplier Maintenance form. Use the fields on this tab to set up rules for replacing improperly-scraped characters.

The screenshot shows the 'Supplier Maintenance' window for 'Holcim (New Zealand) Ltd'. The 'eDocs' tab is selected, and the 'Field Conversion Rules' sub-tab is highlighted with a red box. Below the sub-tab, there is a 'Test Conversion' dropdown menu and a 'Test' button. A table is present with the following columns: 'Field Name', 'Strip', 'Replace with', and 'In Position'. The table is currently empty.

Note: You must set up rules for individual suppliers.

To set up a rule:

1. Enter the name of the field in the eDocs header that contains incorrect characters.
This must be the *exact* name of the eDoc header field to which the rule applies ? for example, *EmailFrom* or *Invoice Number*.
2. In the **Strip** field, enter the characters that are incorrectly scraped.
For example, if Xtracta interprets *INV-HO* as *INV-H0*, enter **H0** in this field.
3. In the **Replace with** field, enter the correct characters. For the example in step 2, enter **HO** in this field.
4. Optionally, enter a number in the **Position** field to indicate that only that character in a field should be replaced.
For example, if you find that the second character in a header field is always being improperly scraped, enter 2 in this field.

If you leave this field empty, then the rule changes every instance of the characters in the string.

5. Repeat steps 1 to 4 for each new rule.

You can test a conversion rule by:

1. Selecting a conversion rule from the **Test Conversion** list.
2. Type the text that you want to test in the field beside the list.

3. Click the **Test** button.

The result displays in the field beside the **Test** button.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

eDocs - Limit Activity Codes for eDocs Requisition Types

We've added the **Activity Groups (eDocs)** subtab to the **Job Cost** tab on the Requisition Type Maintenance form. Use this tab to select one or more activity codes for a requisition type. Doing that restricts the activity codes available:

- To a user for a job.
- When coding an eDoc for a job. This is based on the requisition codes for the supplier.

To limit activity codes, do one of the following:

1. Select a code from the **All Unassigned JC Activity Code Groups** list and click **>** to move it into the **JC Activity Code Groups Assigned** list.
2. Click **>>** to move all activity codes into the **JC Activity Code Groups Assigned** list.

Note: The **All Activity Groups** option is selected by default.

eDocs displays the matching items for the the activity code or codes that you select on the **Activity Groups (eDocs)** subtab. Only the activity codes valid for both the activity group on the job and the activity group on the requisition display. This limits the number of jobs that display on the form.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

eDocs - Issues Fixed in 2019.5.0

We've fixed these issues in eDocs:

- The selling price and amount for a requisition line on an eDoc AP invoice displays correctly on the Edit Line Item form when you drill down on the requisition line.
- eDocs now uses the currency of an eDoc's company, rather than that of the company you're logged into, to determine its foreign currency rates.
- *Error 1090* no longer occurs when you tab out of the **Code** field on the **Job** tab of the AP Invoice form when that field contains an invalid job code.
- *Error 14049* no longer occurs when you click on the eDocs **Transaction** subtab on the AP Supplier Maintenance form when the site has suppliers with more than 32,000 transactions

- Reference:
- Type: Bug
- Release version: 2019.5.0

GT

Greentree Desktop - Issues Fixed in 2019.5.0

We've fixed these issues in Greentree Desktop:

Accounts Receivable

- You can now select component serial numbers when creating a credit note for a kitset on the AR Credit Note Entry form.

HR Payroll

- The BACS hash code is no longer zero on payment lines when you create a payment at UK sites running the 32-bit version of Greentree Desktop.
- The dates for Fringe Benefit Tax (FBT) reported to the Australian Tax Office are now correct. The STP lodgement period is no longer used as the FBT period, and the employee's record is now included in the Payment Summary Report.
- The reporting of the back pay amount *Lump Sum E* on the Payment Summary report for Australia has been fixed.
- Error 1090* no longer occurs when generate an XML preview for an STP lodgement that contains at least one terminated employee.
- When you create back pays, Lump Sum E calculations are now posted to Lump Sum E transaction codes in Greentree Desktop. Lump Sum E amounts are also included in STP calculations.
- We've updated the termination wizard to ensure that 8% of an employee's gross pay for the period from their last anniversary date to their date of termination is included in the payout on termination.
- An error no longer displays when you link an HR employee, who's been employed for more than a year, with an existing JC employee.

Sales Orders

- The NS price on a sales order no longer uses the local currency price as the foreign exchange price.

Various Fixes

- TaskServerNodeManager now shuts down properly and does not leave an orphan jade.exe process running.
 - The depreciation of fixed assets no longer ignores the **BV** option selected on the **Depreciation** tab when the depreciation frequency is **Daily** and the **By Days** option is selected from the **Depreciation Flag** list on the Fixed Assets Module Control form.
 - On the Inventory Selling Price Maintenance form, the amount in the **Price (tax incl)** no longer changes to the amount in the **Price (tax incl)** when you click between the fields.
 - Error 14079* no longer occurs when you enter a postal code with more than four characters on the HR Employee Maintenance form.
 - An employee's birth, start, next anniversary, or termination dates with a two-digit year (for example, *01/01/21*) now correctly displays when you set the **Date entry format** on the User Preferences form to *dd/mm/yy*.
 - The Bulk Edit status bar now displays on devices with Ultra High Definition (UHD) displays.
 - The import of EDI sales orders no longer fails when the order contains an inactive item.
 - Workflow Desktops now load faster at sites with *very* large numbers of requisitions.
 - You can no longer change the job on a line after you save an inventory transaction. Instead, you must delete and re-enter the line. This prevents the job from being allocated to the wrong general ledger ? for example, to suspense.
- Reference:
 - Type: Bug
 - Release version: 2019.5.0

Greentree Browser - Issues Fixed in 2019.5.0

We've fixed these issues in Greentree Browser:

- The calendar section at the top of the Leave Request badge no longer shows the last month twice at end of January of each year.
- If a user does not have permissions to edit an employee record or a leave request, the record or the request are now read only.

- The tax percentage on a sales quote created using Pricing and Availability or the Catalogue is now based on the customer's tax code.
- We've corrected a display problem that prevented users from adding tree branches on forms.
- Reference:
- Type: Bug
- Release version: 2019.5.0

HR

Greentree Desktop - Capture Modified Timestamps and Users on HR Timesheet Lines

Greentree Desktop now captures modified timestamps and users on HR timesheet lines. Greentree Desktop now captures those properties when you:

- Create lines.
- Change lines.
- Synchronise changes from the Job Cost module for either JC employees or JC-PR employees.
- Perform line-level approvals in Greentree Browser and in Greentree Desktop.
- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Payroll

Greentree Desktop - Resubmit Final STP Lodgements for the Year

You can now resubmit the final STP lodgement for a year if you find errors or problems with one or more employee submissions for that year.

To resubmit the final lodgement for the year, you'll need to:

1. Correct the problems with the employee submissions.
2. On the STP Update Lodgement form, resubmit the lodgements for those employees.
Make sure that the **Final for year** option is *not* selected.

To filter employees, click the **Unfinalised** option.

3. Resubmit the final lodgement for the year for those employees.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

System Setup

Greentree Desktop - Team and User Enquiry Form

We've added the Team and User Enquiry form under **System > System Setup > Teams and User Enquiry**. This form is a set of views of teams and users, along with their access rights, across companies.

You can use this form to review the team and user security settings, and to export those settings to provide to auditors. You *cannot* use the form to change the security settings for a team or user.

The form has two panels:

- The [menu panel](#), which enables you to select the teams, users, companies, menus, and suites for which you want to view access rights.

Double clicking a user, team, or company in the menu panel drills down to a maintenance form.

- The [main panel](#), which displays information about team and user security settings, depending on what you select in the menu panel.

Double clicking an item in a table main panel selects that item in the menu panel. The details of the item display in the main panel.

Menu item	Data Entry							
Module	Main Menu							
<input checked="" type="radio"/> Teams <input type="radio"/> Users	Companies <input type="text" value="(All)"/>							
Team	All	eComputers AUS Chris's	eComputers CAN Chris's	eComputers CON Chris's	eComputers IRE Chris's	eComputers NZ Chris's	eComputers UK Chris's	eComputers USA Chris's
ADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Approvals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
CRM SERVICE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
HR Monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
HR Weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
SALES	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
SDTeam								
Web3D Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

main panel.

Team	All	eComputers AUS	eComputers CAN	eComputers CON	eComputers IRE	eComputers NZ	eComputers UK	eComputers USA
ADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Approvals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
CRM SERVICE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
HR Monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
HR Weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
SALES	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
SDTeam								
Web3D Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

In the main panel, select the:

- **Teams** option to display menus available to teams.
- **Users** option to display menus available to users.

Searching

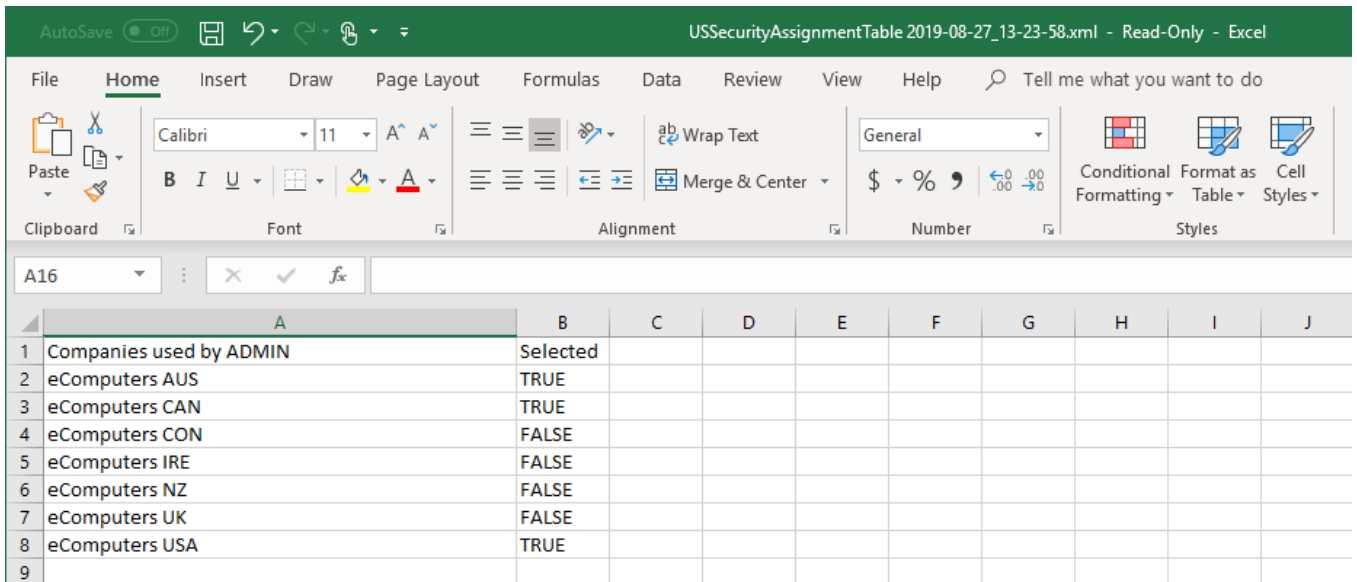
You can search for specific items in both the menu and main panels using the search field.

Exporting Information

You can save the information in the tables that display on the main panel to provide to auditors. To do that, right click in a table in the main panel, choose **Launch table contents in**, and then select one of these options:

- **XML for Excel** - Opens the results in Excel, with column headings.
- **CSV** - Opens the results in Excel, without column headings.
- **HTML** - Opens the results in your default web browser.
- **Text** - Opens the results in your default text editor.

Security options that are enabled display as *TRUE* in the output. Options that aren't enabled display as *FALSE* in the output.



	A	B	C	D	E	F	G	H	I	J
1	Companies used by ADMIN	Selected								
2	eComputers AUS	TRUE								
3	eComputers CAN	TRUE								
4	eComputers CON	FALSE								
5	eComputers IRE	FALSE								
6	eComputers NZ	FALSE								
7	eComputers UK	FALSE								
8	eComputers USA	TRUE								
9										

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Greentree Desktop - JC Employee Maintenance Form in Windows Designer

You can now customise the JC Employee Maintenance form in Windows Designer.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Greentree Browser - Improved Deployment Process

We've simplified the **Finalising browser screens** step when applying a package using Packman. This enhancement reduces deployment time for sites that don't use Greentree Browser. Any data specific to Greentree Browser is also purged in this step. This frees approximately 2GB of storage space when compacting database files.

Packman now prompts you to run the **Initialise Browser Application** task when you try to turn on Greentree Browser. If your site is using Greentree Browser, schedule this task to run outside of business hours. Once the task completes, you can turn on Greentree Browser using the normal process.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

WebView

WebView - Issues Fixed in 2019.5.0

We've fixed these issues in WebView:

- When you add a user with permissions to access the Document Library, that user can now view older documents in the Library.
- Reference:

- Type: Bug
- Release version: 2019.5.0

Workflow

Greentree Desktop - Display PDFs in Desktop Panels

You can now display PDF files in 3D Live Workflow Desktop panels. We've done this by extending the *Image* attachment type to include files with the extension *pdf*.

The screenshot shows the 'Attachment Type Maintenance' window. The 'Code' field is 'Image', the 'Description' is 'Pictures and Photos', and the 'File Extensions' field contains 'bmp;jpg;jpeg;png;tif;tiff;gif;pdf;'. The 'Web Accessible' checkbox is unchecked, and the 'Save to Document Library' dropdown is set to 'Never'. The status bar at the bottom indicates 'Editing an existing Attachment Type' and 'Attachment Type 2 of 4'.

Note: If you create a new attachment type that includes PDF files, you must add *pdf* to the list in the **File Extensions** field on the Attachment Type Maintenance form.

When you edit or create a 3D Live panel, you can select a PDF to attach to the record. Set the PDF as the primary attachment to display it when you load the panel.

Note: You must have Adobe Acrobat Reader installed on your workstation to view PDFs in a 3D Live panel.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Browser Approvals

Greentree Browser - Improved Display of Leave Balances

We've changed the way in which an employee's entitled and accrued leave balances display on the Leave Balances panel. Both balances now appear at the top of the panel:

Leave Balances

Type: Annual Leave As at: 29/08/2020

Entitled	20.05 days (160.42 hrs)
Accrued	32.51 days (260.09 hrs)

From	To	Type	Days	Hours	Status
30/03/2020	29/08/2020	Accrual	8.36	66.88	
01/04/2019	29/03/2020	Accrual	19.22	153.75	
06/01/2019	31/03/2019	Accrual	4.93	39.45	

The balances include both the number of days and the number of hours an employee is entitled to or has accrued.

Note: This change only applies to annual leave and long service leave.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Browser Licensing

Greentree Browser - Browser Enquiry License

You can now apply enquiry licenses in Greentree Browser. The enquiry licence enables users who have access to CRM forms in Greentree Desktop to view CRM records in Greentree Browser.

You can apply an enquiry license to these CRM forms and panels:

Forms	Panels
Appointments	Calls
Communications	Appointments
Followups	Communications
Service Requests	Followups
Sales Orders	Service Requests
Calls	Unallocated Service Requests
Leads	Unallocated Calls
Relationship Centre	Open Leads
	Pipelines

You can use an enquiry license with all companies in an organisation or with a specific company. Or, you can use a license with one or more user groups or teams.

Note: When a license has been applied, users can only view information. They can't edit it.

If a user doesn't have an enquiry license for a particular form or panel:

- Greentree Browser displays an error message when they try to access that form or panel, or
- The user can't see the link to the form in Greentree Browser's menus.

Contact your Greentree partner to learn more about purchasing enquiry licenses.

- Reference:
- Type: Enhancement
- Release version: 2019.5.0

Mobile-HR

Greentree Desktop - Update Service Requests Entered in Greentree Browser

When you add lines to a timesheet in Greentree Browser, the corresponding service request in Greentree Desktop now updates with the information on those lines. To enable this, select the **SR Only** option from the **Timesheet updates** list on the **Timesheet** subtab. You can find the subtab on the **Timesheet Employee** tab on the Mobile Employee Maintenance form.

The screenshot shows the 'Timesheet' subtab configuration. Under 'Details', 'Working Calendar' is 'Business', 'Week end day' is 'Friday', and 'Timesheet updates' is set to 'PR only'. The 'Preferred view' dropdown is open, showing 'PR only' selected. Under 'Actions', 'Use Timesheet control' is checked. 'Daily max hours' and 'Weekly max hours' are both set to 0.00. 'If more' warnings are set to 'No warning'. The 'SR only' option in the 'Timesheet updates' dropdown is highlighted with a red box.

When you create a timesheet in Greentree Browser and enter information in the **SR Status**, **Hours to Complete**, and **Complete %** fields, the **Field Service Schedule** section on the **Time Line** tab on the Service Requests form in Greentree Desktop updates.

Note: If you enter multiple lines for the same service request in a timesheet, only the last line that displays on the Timesheet form in Greentree Browser updates.

Important Information

Adding lines to a timesheet in Greentree Browser only updates the service request. It *does not* update timesheet lines in Greentree Desktop.

If you need to submit timesheet lines, you must add the **Status**, **Hours to complete**, and **Complete %** columns to the **Approvals** tab on the Class Maintenance form. You can find this under **System > System Setup > Class Maintenance** in Greentree Desktop.

If no approval is required, the status of the timesheet line is shown as **Entered** rather than **SR Processed** when you save it.

Note: If you change a service request in Greentree Desktop, it doesn't update in Greentree Browser.

- Reference:
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Type: Enhancement

- Release version: 2019.5.0