2023.2 Release Notes

The 2023.2 release simplifies several common workflows. You can now write off job costs in bulk. Emailing is also less time-consuming, now that you can create email templates. It also includes various minor improvements and addresses a range of issues identified in previous versions.

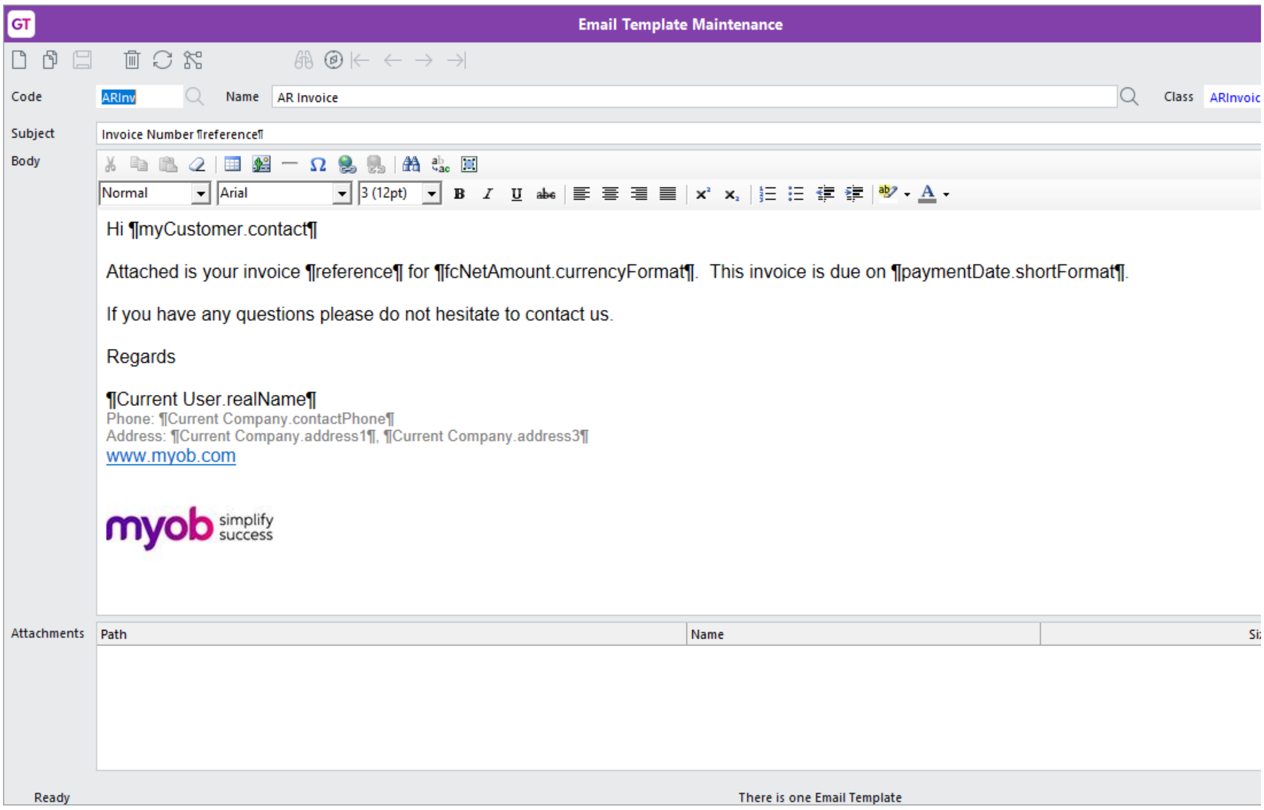
> For Australian companies, this release also updates rates and thresholds to comply with requirements for the 2023–2024 financial year. For more information, see the end of year payroll processes guide.

New features

Email templates

Simplify your emailing workflows by creating email templates on the new **Email Template Maintenance** form. Open this form by going to **System** > **System Setup** > **Email Template Maintenance**.

> This new feature doesn't affect how CRM email templates work.



Email template options

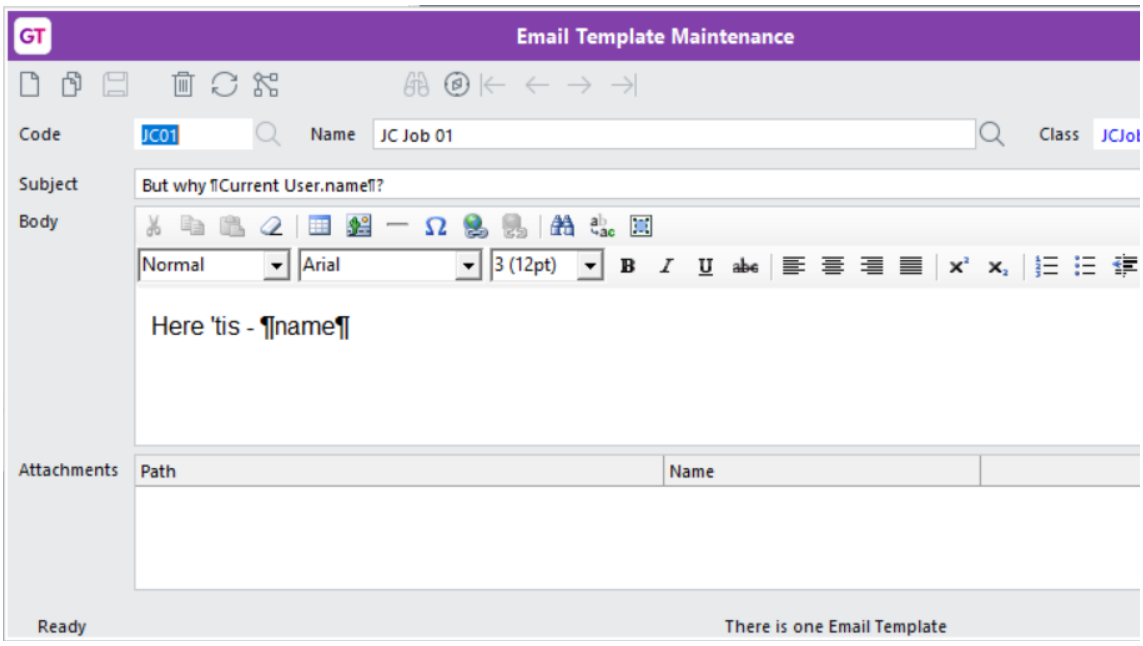
You have lots of options when creating an email template form:

- **Code** – Required. Enter a short code you can use to identify the template.
- **Name** – Required. Enter a descriptive name for the template.
- **Class** – Required. Select a class that the template belongs to. The class determines what properties and variables you can add to the template.
- **Subject** – The subject lines of emails that use this template.
- **Body** – The main body text of emails that use this template.
- **Add Property** – Click this button to view different data elements and runtime variables you can add to the template. For example, you can add a customer's name as a variable to the body of the email. To add a property to the body, select a property and click **Insert Body**. To add a property to the subject, select a property and click **Insert Subject**.
- **Attachments** – Click **Add Attachment** and choose the file you want to attach to all emails that use this template.

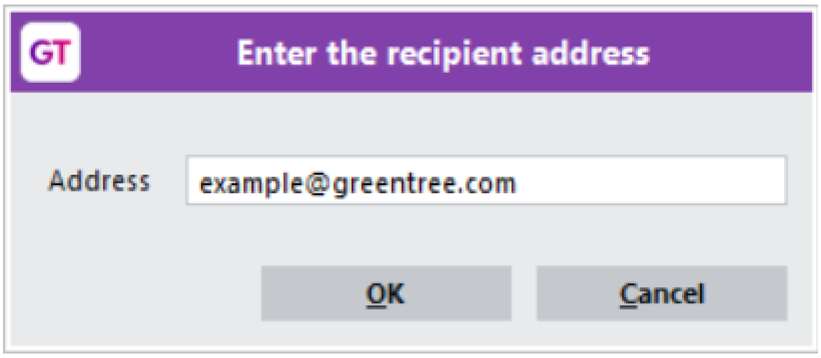
> Adding lots of large attachments can negatively affect eReporting speed.

Testing an email template

To make sure your emails using a template look the way you want them to, you can send a test email. On the **Email Template Maintenance** form, click **Test Send**.



Then enter an address in the **Enter the recipient address** window and click **OK**.



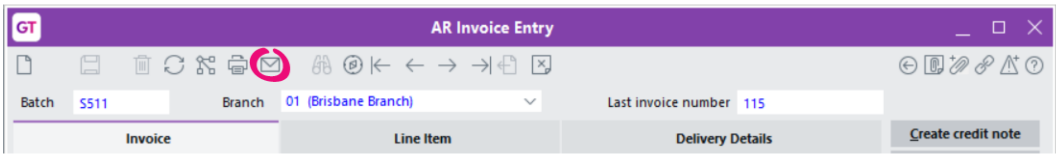
Simplified emailing workflows

This release standardises emailing workflows across Greentree.

New email icon

You can now more quickly email individual documents by clicking the new **Email** icon (✉) on a form's toolbar. Previously, you had to click the **Print** icon and select email as the output. The **Email** icon is available on the toolbar of these forms:

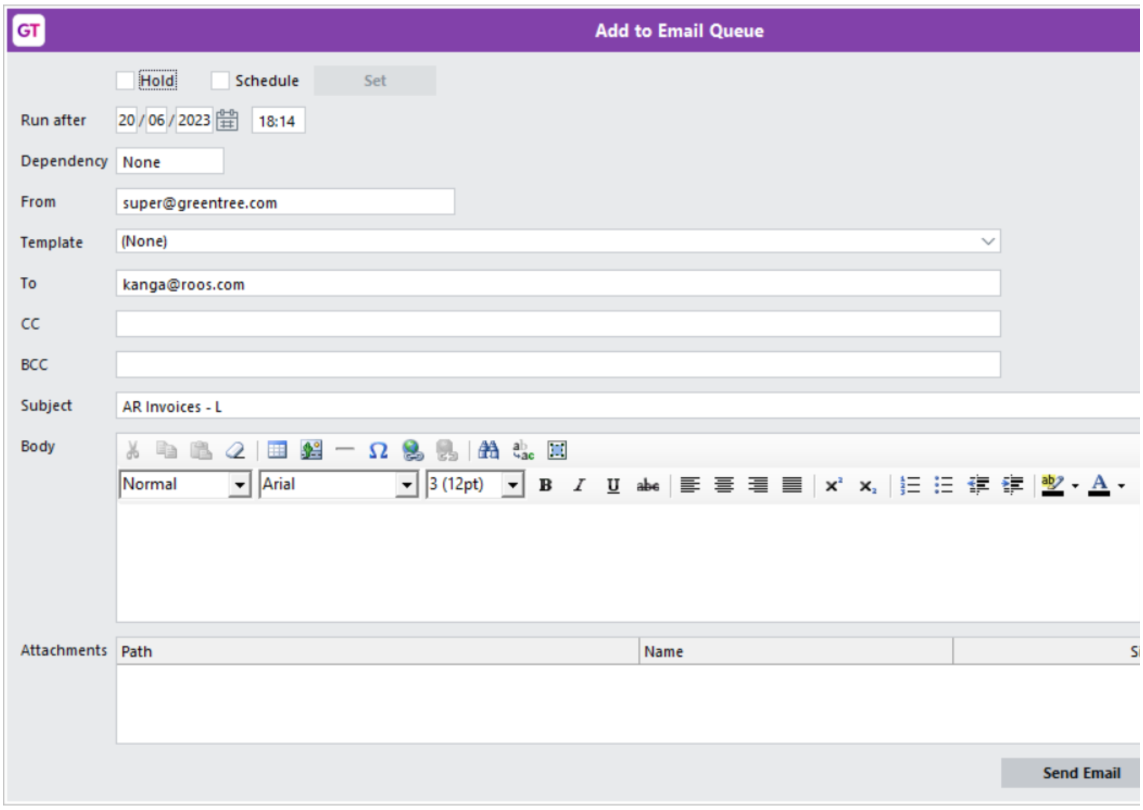
- **AR Invoice Entry**
- **AR Receipt Entry**
- **AP Invoice Entry** (for buyer-created invoices only)
- **AP Payment Entry**
- **PO Purchase Order Entry**
- **HR Pay Entry**.



Depending on your hotprinting setup, clicking the **Email** icon (✉) either opens the new **Add to Email Queue** form or the existing **Print Report** form (with the output automatically set to **Email**).

New Add to Email Queue form

When emailing from a transaction or report, the new **Add to Email Queue** form lets you use an email template or write an email from scratch.



What templates are available?

The available templates depend on how you get to the **Add to Email Queue** form.

If you get there from a form where output to email is available, then you can choose from transaction and Masterfile templates. These templates allow the email to be automatically filled with details about the transaction or document.

If you get there by selecting **Auto email** or **Auto email/print** on the **Print Report** form, then you can only choose from Masterfile templates. This is because the email you send might have multiple attachments, so individual transaction details wouldn't be applicable.

If you select **Email** as the output from a hardcoded or softcoded report, the templates are based on a class of Company.

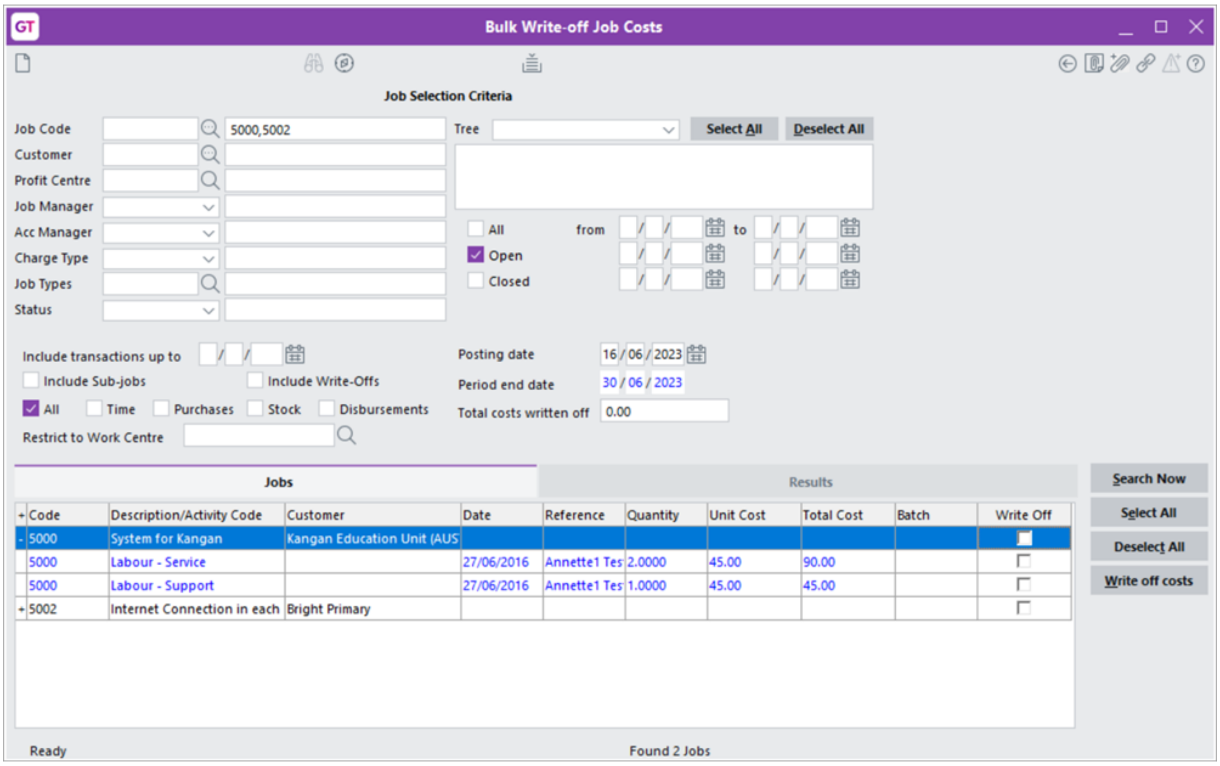
How you get to the Add to Email Queue form	Template classes available
AR Invoice Entry	ARInvoice Customer
AR Receipt Entry	Receipt Customer
AP Invoice (buyer-created invoices)	APInvoice

How you get to the Add to Email Queue form	Template classes available
AP Payment Entry	Payment Supplier
Purchase Order Entry	POPurchaseOrder Supplier
HR Pay Entry	HRPay HRPerson
Hardcoded reports when email output is selected	Company
Softcoded reports when email output is selected	Company
eReporting AP Remittances	Supplier
eReporting Purchase Order	Supplier
eReporting AR Invoice	Customer
eRporting AR Statements	Customer
eReporting AR Receipt	Customer
eReporting HR Pays	Employee

Writing off job costs in bulk

You can now write off the costs for multiple jobs at the same time by using the new **Bulk Write-off Job Costs** form. This saves you the hassle of having to write off costs by recalling each job one by one. Open the new form by going to **Process** > **Job Cost** > **Bulk Write-off Job Costs**.

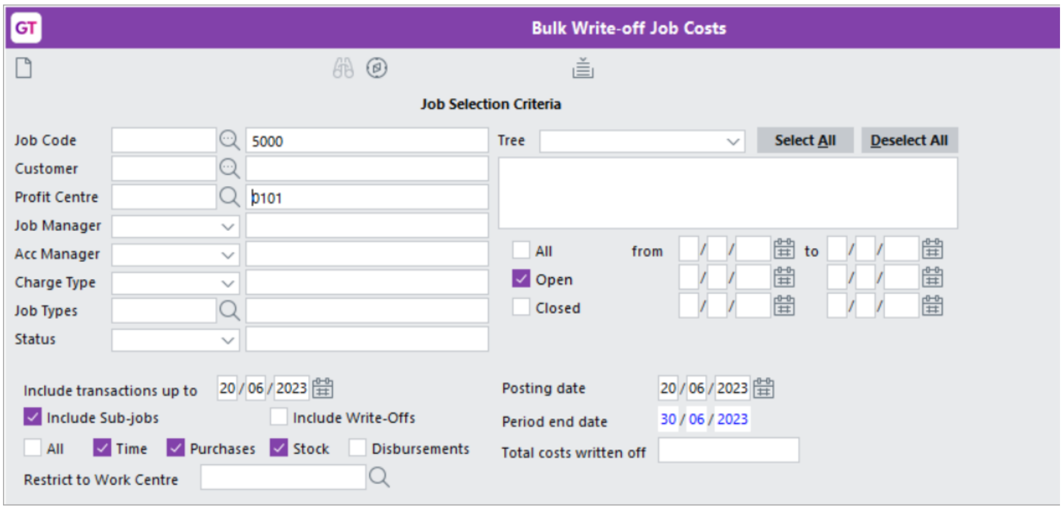
You can also use the form to undo write-offs.



To write off job costs in bulk

1. Choose which jobs to view by completing fields in the **Job Selection Criteria** section.

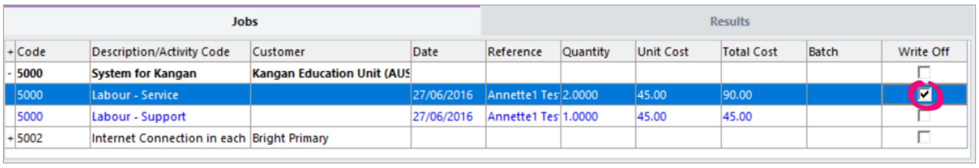
   For example, you can select a profit centre or charge type combination. Or, you can search by transaction by using the **Include transactions up to** field and selecting the types of transactions you want to include.



2. On the right of the form, click **Search Now**. Jobs that meet your criteria are listed in the **Jobs** tab.

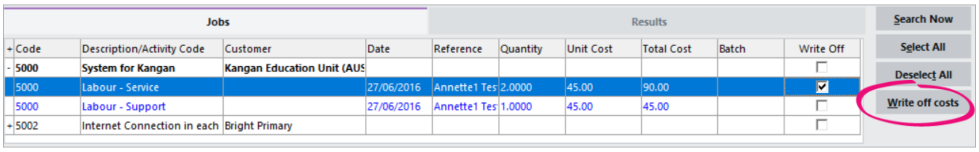
> You can view a job's individual costs by clicking the plus icon for a row.

3. In the **Write Off** column, select the costs you want to write off.



Code	Description/Activity Code	Customer	Date	Reference	Quantity	Unit Cost	Total Cost	Batch	Write Off
5000	System for Kangan	Kangan Education Unit (AUS							
5000	Labour - Service		27/06/2016	Annette1 Tes	2.0000	45.00	90.00		✓
5000	Labour - Support		27/06/2016	Annette1 Tes	1.0000	45.00	45.00		
5002	Internet Connection in each	Bright Primary							

4. On the right of the form, click **Write off job costs**.



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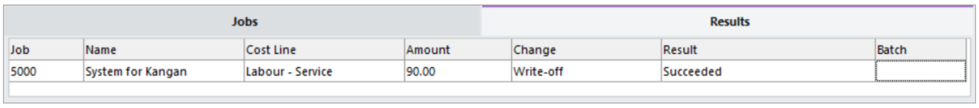
5000	Labour - Support		27/06/2016	Annette1 Tes	1.0000	45.00	45.00		
5002	Internet Connection in each	Bright Primary							

5. The **Confirm Write-off** message warns you that you are about to write off a cost. Click **OK**.

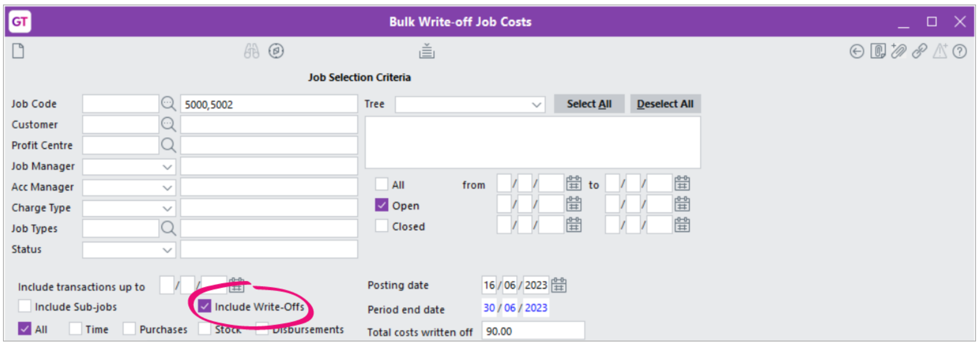
   After confirming, the written-off costs are listed in the **Results** tab.



Job	Name	Cost Line	Amount	Change	Result	Batch
5000	System for Kangan	Labour - Service	90.00	Write-off	Succeeded	

To undo a write-off

1. In the **Job Selection Criteria** section, select the **Job Code** with the written off costs you want to undo.
2. Select the **Include Write-Offs** checkbox.



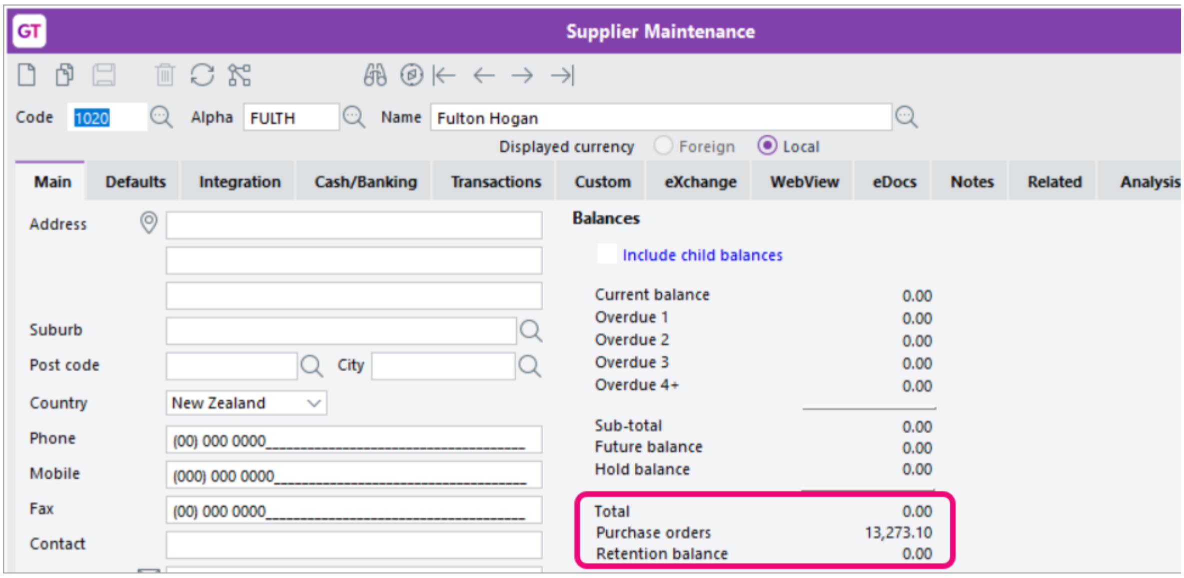
3. On the right of the form, click **Search Now**.
4. In the **Jobs** tab, deselect the **Write Off** checkbox for the written off cost you want to undo.
5. On the right of the form, click **Write off costs**.
6. The **Confirm Write-off** message warns you that you are about to undo a write off. Click **OK**. After confirming, the undone write-off is listed in the **Results** tab.

Packman changes (MYOB Partners only)

- Debug packages now have minimum and maximum version number requirements. To be able to apply a debug package, your version of Greentree has to be within the requirements. For example, if a debug package has a minimum requirement of 2022.1 and a maximum of 2022.3, you can deploy it to your system on version 2022.2, but not to your system on version 2021.4.
- Packman now optimises Greentree Browser screens faster when packages are being finalised.

Other improvements

- The **Main** tab of the **Supplier Maintenance** form now displays a total value for purchase orders. Clicking the total value also opens the **PO Enquiry** form for the outstanding purchase order.



- Workflow desks that contain AP or AR Aging panels now load faster. This also resolves the support issue with an ID of 00012229.

> This improvement requires the Jade server .INI file to contain this setting:
>
> `[JadeServer]`
>
> `AllowKeyPathsWithoutInverses=true`
>
> Although this setting will already be in the JadeClient section, it also needs to be in the JadeServer section. Without this setting, the AR Ageing workflow tile will raise an exception if a customer needs to build period summaries.

- To help prevent mistakes when submitting Single Touch Payroll (STP) reports, Greentree now checks the **Total Tax Offset Amount** field on the **HR Employee**

Maintenance form, making sure that there are no decimal values. Greentree also checks certain other fields to make sure there are no negative values.

- This release adds a new system script: **System - Extract email settings**. If you're having issues with emailing, you can use this script to output all email settings to a file, making it easier for Greentree support to diagnose the issue.

Greentree API updates

This release includes updates to the Greentree API. For a list of what's changed and what's been fixed, see the 2023.2 API release notes.

Resolved issues

Greentree Desktop

Issue IDs	Description
00012201	Tile format colours on the headers of 3D live panels were displaying incorrectly. This has been resolved.
00012572	On the **HR Module Control** form, a payroll error could occur for sites without the payroll module enabled: "Payroll lodgement notification email address is invalid." This has been resolved.
00012634	When adding multiple action templates to an action plan, the numbering of action plan lines was incorrect. This has been resolved.
00012666	On the **Select Order** tab of the **AP Invoice Entry** form, you couldn't select advanced invoice purchase orders that had been shipped. This has been resolved.
00012636	When exporting **Explorer** data, plug-in object data wasn't being included in the exported file. This has been resolved.
00012677	On the JC Job Template Maintenance form, using the **Next** and **Previous** buttons to navigate between templates caused the **Job manager** or **Account manager** fields to be incorrectly assigned based on the previous record when they should be left blank. This has been resolved.

Issue IDs	Description
00012765	When drilling down to a form with display fields added through Windows Designer, the fields were blank. This has been resolved.
00012712	When creating a job quote for a stock item on the **Quote Maintenance** form, changing the default **UOM** caused the **Retail Rate** to calculate incorrectly. This has been resolved.
00012605	After copying an asset to forecast on the **FA Copy Live to Forecast** form, the **Current Acc (Tax) Book Value** would exclude depreciable value adjustments. This has been resolved.
00010999	When a super user updated a bill of materials by using the gtMFBill function, an error would occur: "The user isn't allowed access to this function. Do you wish to continue?" This has been resolved.
00012229	Workflow desks that contained AR or AP Aging panels would take a long time to load. This has been resolved.
00012846	*New Zealand companies only*. For lump sum payments, the pays included in the count back period could be incorrect. This has been resolved.
00012834	On forms customised with Windows Designer, the **Select Customer Tree** window wasn't displaying the **Deselect** button. This happened if you edited a tree where the field had been moved out of the **Trees** table on the **Custom** tab. This has been resolved.
00012829	On the **JC Sales Split** form, you were able to delete the sales splits for invoiced lines. This has been resolved. You can no longer delete the sales splits for invoiced lines
00012826	On the **Account Group Maintenance** form, changing a branch description would remove users from the branch and add other users to it. This has been resolved.
00012691	Factory orders and factory order receipts were being posted to the general ledger, even if the general ledger wasn't integrated with inventory. This has been resolved.
00012682	The FREE function gtPOPurchaseOrderAddress has been improved to allow literal dates for the **Requested Date** and **Shipped Date** parameters. Previously, you had to use a reference to another cell containing a date. This release includes a new version of Excel add-in MYOB_GreenTree_FREE.xla.

Greentree Browser

Issue IDs	Description
00011139	If timesheet payroll mapping has been set up, timesheet lines you add from your favourites wouldn't include a **PR Tran Type**. This has been resolved.

WebView

Issue IDs	Description
00012719	In Greentree Browser, if you clicked **Save to Microsoft Excel** for a transaction line of a financial report, the Microsoft Excel file would incorrectly include all transactions for that tree branch's GL account. This has been resolved.
00012686	Drilling down in a WebView form could cause an error (Error 4). This has been resolved.

eDocs

Issue IDs	Description
00012873	When opening an eDoc that contained an instant alert, the PDF wouldn't be displayed. This has been resolved.
N/A	An error prevented you from saving an eDoc AP invoice if it hadn't been assigned a supplier. This has been resolved.