

Greentree®

BUSINESS-BUILDING SOLUTIONS



February 2009

"very, very, responsive!"

Volume 1, Issue 1

A Word from the Editor



Welcome to the first issue of the JR.Bizlink Greentree Newsletter.

We will be producing this newsletter on a regular basis to keep our family of Greentree users up to date with the latest Greentree News.

Each issue will also contain tips, tricks or general user information which I am sure you will find useful.

Ciao for now.

Teresa Hooper

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Profile – Teresa Hooper - Partner

Teresa's 30 years experience in the industry in both commercial and professional fields. This breadth of experience has made her ideally suited for her role as a Partner in Johnston Rorke. In this role she works closely with business owners in developing their business management skills, and advising on matters of financial reporting, computer applications and general business practices.

Jr.bizlink is managed by Teresa and is assisted by Senior Consultants and Accountants. Teresa's position within the industry is unique as she is both an IT project manager and a partner within Johnston Rorke. It is this synergy that allow jr.bizlink to fully understand and implement the Greentree System into a business environment.



Greentree

Posting Periods

- Lynette Schaefer and Bernice Boucher

In Greentree users with the right security level are able to maintain the Posting Periods for the Modules they use.

Posting Periods belong to a Calendar, usually this Calendar is named Financial Year.

Every Company in Greentree has its own Calendars and can be maintained independently

Posting Periods can either be;

Permanently Closed	Not Allowed
Closed	No data entry can be done
Open	Data entry can be done to this period
Current	Reports and some data entry will default to this period

TIP

Closing a previous period will ensure users do not accidentally post to that period potentially affecting the BAS report.

Keeping future periods closed can also ensure users do not forward accidentally forward date transactions.

To modify the Posting Period status for Accounts Payable;

SYSTEM>ACCOUNT PAYABLE>POSTING PERIOD MAINTENANCE

Retrieve the correct Calendar

Double click on the year you wish to change eg 2008/2009

Another box will display the periods



Right Mouse click on the Period you wish to change eg August

Now you are able to change the status of that period

In this case by either making it Current or the Last Period Open



If you choose to make August current the following settings will take effect

August will be Current but July and September to June are open and postable

DEMONSTRATION COPY



Maintain Periods: 2008/2009

Description	Start Date	End Date	In Use
July	01 July 2008	31 July 2008	true
August	01 August 2008	31 August 2008	true
September	01 September 2008	30 September 2008	true
October	01 October 2008	31 October 2008	true
November	01 November 2008	30 November 2008	true
December	01 December 2008	31 December 2008	true
January	01 January 2009	31 January 2009	true
February	01 February 2009	28 February 2009	true
March	01 March 2009	31 March 2009	true
April	01 April 2009	30 April 2009	true
May	01 May 2009	31 May 2009	true
June	01 June 2009	30 June 2009	true

Open Closed Current Permanently Closed Close

Now only August is Open and all other periods are Closed

Maintain Periods: 2008/2009

Description	Start Date	End Date	In Use
July	01 July 2008	31 July 2008	true
August	01 August 2008	31 August 2008	true
September	01 September 2008	30 September 2008	true
October	01 October 2008	31 October 2008	true
November	01 November 2008	30 November 2008	true
December	01 December 2008	31 December 2008	true
January	01 January 2009	31 January 2009	true
February	01 February 2009	28 February 2009	true
March	01 March 2009	31 March 2009	true
April	01 April 2009	30 April 2009	true
May	01 May 2009	31 May 2009	true
June	01 June 2009	30 June 2009	true

Open Closed Current Permanently Closed Close

If you choose to make August the Last Open the following settings will take effect

July is still Current but July is still open and postable

Maintain Periods: 2008/2009

Description	Start Date	End Date	In Use
July	01 July 2008	31 July 2008	true
August	01 August 2008	31 August 2008	true
September	01 September 2008	30 September 2008	true
October	01 October 2008	31 October 2008	true
November	01 November 2008	30 November 2008	true
December	01 December 2008	31 December 2008	true
January	01 January 2009	31 January 2009	true
February	01 February 2009	28 February 2009	true
March	01 March 2009	31 March 2009	true
April	01 April 2009	30 April 2009	true
May	01 May 2009	31 May 2009	true
June	01 June 2009	30 June 2009	true

Open Closed Current Permanently Closed Close

TIP

Cash Management does not have posting periods, so no maintenance is required.

NB

Please ensure that you choose carefully which periods you change the status for, also keep in mind other users who may be working on your companies.

- LS & BB

Now you can change the Status on August again to make it First Open Period

The screenshot shows a software interface with a menu bar (File, Edit, Data Entry, Enquiry, View, Process, Reports, System, HR, SCM, CRM, Workflow, Window, Help) and a toolbar. A 'Calendar: JUN' window is open, displaying a table of periods with columns for Description, Start Date, End Date, Period Length, and In Use. A 'Maintain Periods: 2008/2009' dialog box is overlaid on the calendar, showing a table of periods. The 'August' row is highlighted in green, and the 'In Use' column for August is set to 'true'. Below the table, there are radio buttons for 'Set as First Open Period', 'Set as Last Open Period', 'Set as Current Period', and 'Permanently Close (non-postable)'. The 'Set as First Open Period' option is selected. At the bottom of the dialog box, there are buttons for 'Open', 'Closed', 'Current', 'Permanently Closed', and 'Close'.

Greentree News—Enhancements

The following are some enhancements that have been included in Greentree during November 2008 to January 2009:

- Split week timesheet entry has been enabled from Service Requests. (greentree3@16-21.package)
- Programmatic events have been added to Approvals and Alerts for invoices created from Purchase Orders and Receipts. (greentree3@16-23.package)
- BPM tasks can now be started manually. (greentree3@16-23.package)
- Bookmarks are now available in the BPM Assistant. (greentree3@16-25.package)
- An enquiry form has been added for IN Dimension Transaction enquiry to dimensional level. This can be accessed via a button on Inventory Item Maintenance or from the Data Entry/Inventory menu. (greentree3@16-33.package)
- A new property selection form and combo box is available in Report Writer, which will enable easier identification of properties

within the body of the report form. (greentree3@17-2.package)

- POS Sales Entry can now be accessed from the Workflow Desktop. (greentree3@17-2.package)
- A function has been added called `gtINStockItemLabelOptions` to import Inventory Item label printing options. (greentree3@17-3.package)
- The following has been added to Webstore: (greentree3@17-8.package)
 1. 'Favorites' facility to the search inventory page.
 2. 'Add to Cart' option to the search inventory page.
 3. 'Price Breaks' facility to the search inventory page
- When using the JC Bulk Create Proforma function the activity type of the cost transactions can be selected for inclusion on the proforma invoices. (greentree3@17-9.package)
- A SO User Preference option has been added to suppress the display of backorder lines in the selection table where the calculated quantity to release is 0.00. (greentree3@17-11.package)
- An option for summary lines from eTimesheets to be

transferred to payroll as either a single line or a separate line per day has been added to the eTimesheets Module Control. (greentree3@17-13.package)

- Two new system fields have been added to the AP Direct Credit Interface to allow the use of the Bank's Currency rather than the Supplier's Currency. (greentree3@17-13.package)
- A bulk update screen for instant alerts text has been added under System/Utilities. (greentree3@17-15.package)
- A JC planning board has been added to graphically represent jobs across a timeline. (greentree3@17-17.package)

HR update - November 08 (greentree3@17.package)

- Added Automation of the reduction of Child Support when the Protected Earnings Rate / Amount is not met. Please refer to the online help for further information.
- The calculation of tax on Bonuses has been automated. Please refer to the online help for further information, specifically the Pay Transaction Type help.
- The calculation of Normal Gross Earnings on the Termination screen has been automated. Please

refer to the online help for further information.

- When Allocations and GL Accruals are in use on a Leave Transaction Type and Accruals are being processed, they will now split the expense account based on the default allocation lines on the employee
- When there are default trees on the employee and GL Accruals are in use, the trees are added to the expense line created when the accruals are run.
- An option to Balance type transaction types to allow zeroing of the balance on Termination has been added.
- Allow Summary lines from eTimesheets to be processed through Timecards in Payroll.



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