

Selected recent product releases

The development team has been hard at work continuing to make Greentree a better product for our customers. To do this effectively they strive to achieve the appropriate balance between resolving customer issues and delivering new features requested by customers. The following are a selection of some of the new features recently delivered.

Financials

- AR & AP Standing Invoices can now include JC transaction lines.
- AP Invoice Entry enhancement for JC variances
 - Provides for PO/JC/IN cost variance transactions to be generated when purchase orders are confirmed.
- CM Bank Statement Entry has had a number of enhancements including the following:
 - Check for changed transactions in multi-user system
 - Rationalise miscellaneous transaction batches
 - Improve GL short code entry
 - Add option to print Bank Reconciliation

- Fixed Asset Masterfile Audit functionality has been added.
- AP Invoice, PO Order & Receipt Entry have been enhanced to provide the ability to alter the selling rate on a JC line.
- AP Supplier & AR Customer Maintenance/Enquiry have been enhanced to add two columns for "Child Code" and "Child Alpha" to display the details of supplier/customer child accounts.
- AP & HR Create Direct Credit File functionality has been extended:
 1. Ensures the correct dates are updated to the file when it is appended to.
 2. Defaults the Create date on the form to today's date and no longer defaults the batch number.
 3. Allows the batch number to be selected from a list of batches.
 4. Displays a warning message if a file has already been created when a batch is selected.
 5. Checks that the bank account selected matches the bank account held against the batch.

Please refer to the release notes for further details.

- Report GL Chart of Accounts by Tree, now prints the selected tree name ie. 'Profit and Loss' in the heading.

Distribution

- PO Shipment Entry
- Additional charges which have been invoiced prior to allocation against the shipment and also marked as 'completed' during the invoicing process, can now be applied to the shipment.
 - PO Entry, PO Shipment Entry, PO Receipt Entry, AP Invoice Entry, PO Module Control have been enhanced to enable dimension details to be maintained against purchase orders and shipments.
 - We have provided a new System Script for Inventory - Update Average Cost
 - This ensures that all inventory items are being listed when there is a variance between the Costing Average and the Period Cost.



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- Introduced IN Inventory Masterfile Audit functionality.

- Introduced a new Inventory Process menu option to enable dimension details to be assigned for all inventory items over a selected range of analysis codes.

Point of Sale

- Major performance improvements have been made to POS Sales Entry
- We have now provided the facility to produce AP buyer/recipient created tax invoices.

- We have released full online for the POS module

Job Costing

- Job Cost AR Invoice and JC AR Credit Note print have been enhanced to allow printing of Invoices/Credit Notes with parameter selections as per AR Invoice/Credit Notes.

1. Print by invoice number range.
2. Print by batch number range.
3. Output via auto email/fax (eReporting) facility

- Released fully updated online help for Job Costing

- Job Cost Masterfile Audit functionality has been introduced.

- Enhance Job Costing to support management of jobs as projects. Users cannot now select jobs where the profit centre is not available in their profit centre group and users cannot now delete or change a customer on a job when

there are invoices, credits and proformas attached to this customer.

General

- As part of our ongoing plans to provide greater functional consistency across Greentree, the AR Customer Maintenance and AR Customer Enquiry forms have enhanced with

1. Side buttons having been added to access relevant data entry functions
2. You can now press a hot key (Ctrl+T) on the notes tab form and the user, date and time is placed on the form.

- Introduced the ability to fully delete a company and all it's related transactions.

- FREE - Transactions Menu has been updated to ensure all update functions have a unique keyboard shortcut key.

- eReporting has been extended to allow the user to select which reply email address is used for all emails generated from Greentree. Options are user, company or system

- FREE has been extended to add the ability to create Accounts Receivable Journals.

- Hot Printing, a Non-super user can now hot print when using Advanced Security.

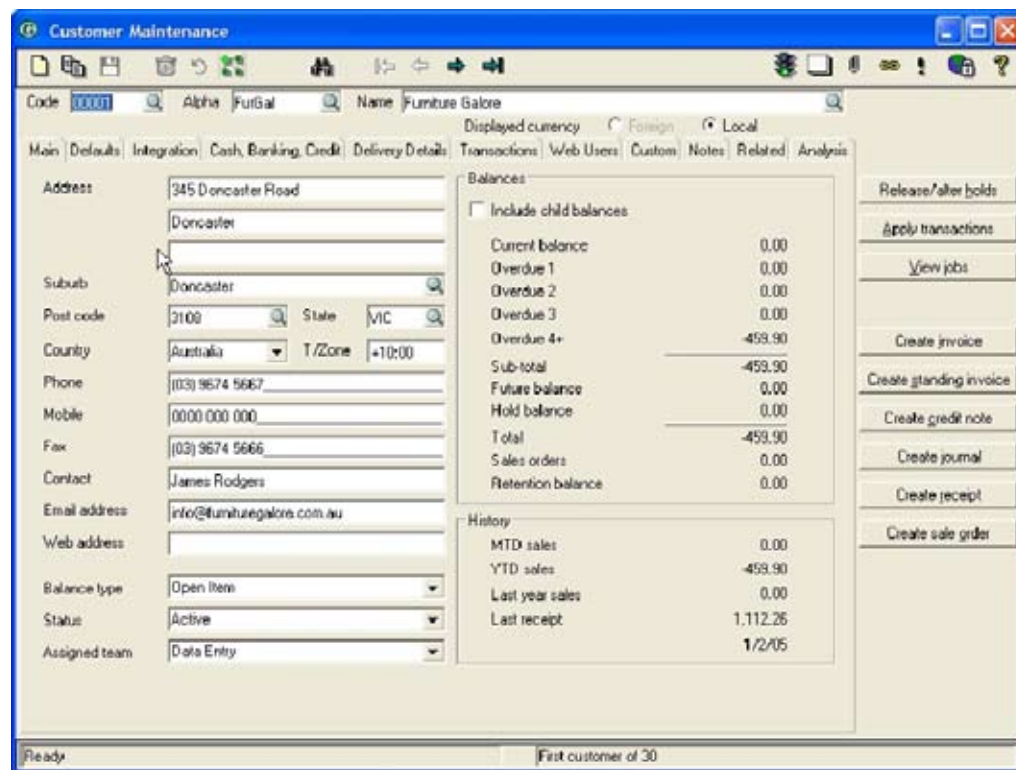
HR/Payroll

- We have modified the Leave Planning to allow this to be purchased independently of HR and Payroll.

Contacts & Relationships

- When phone masking is not in use, the phone

numbers are now being displayed as they were entered. For example, +64(9)3663888 is now being displayed rather than 6493663888 as it was previously being displayed.



Sales & Marketing

- Service type quotes are now allowed from the Sales & Marketing Quotes menu.
- The Convert to Job Quote button is also now available on Service type quotes. In the last

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release we made it available to Sales type quotes when job cost was in use but we have also added this functionality to Service type quotes.

Service & Support

- The Service Request has changed. The Primary Asset, Contract and Service Level fields have been moved up under the Contact fields. The status of the call is also now shown on the right of the service level on the main tab and can be updated both there and on the additional tab, as per previously.

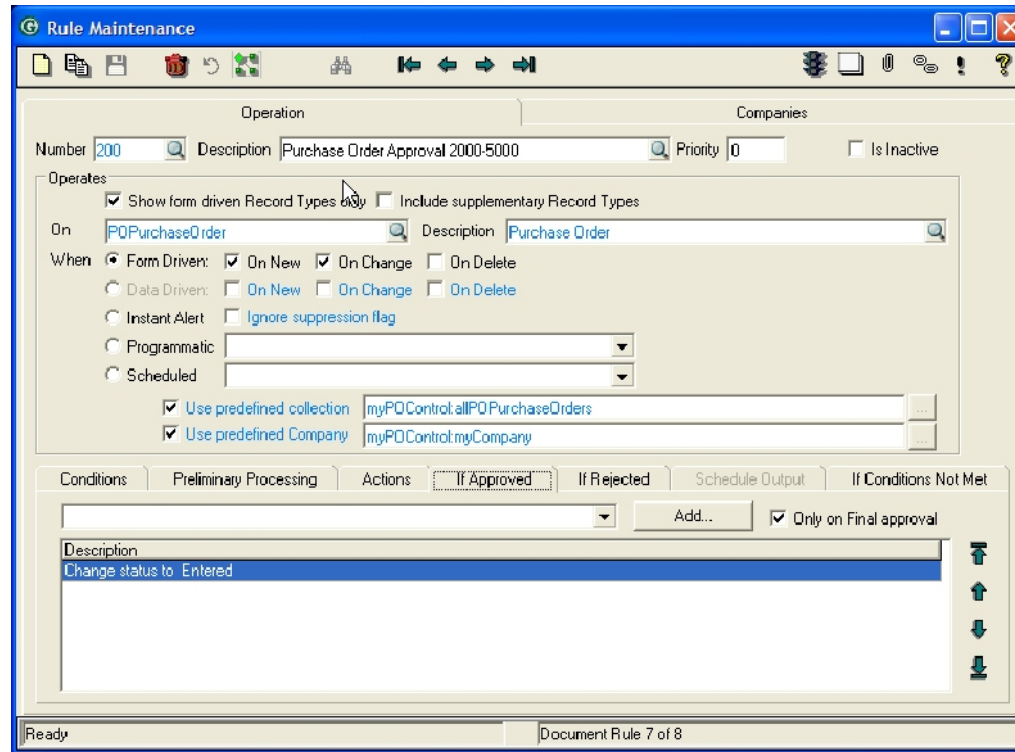
- Sales Orders can now be created from Service Type Quotes.

General CRM Changes

- Added functionality for synchronisation between CRM and Outlook for contacts and tasks. When a task that comes from CRM is closed in Outlook then it is also closed in CRM.

Approvals and Alerts - Powerful Control.

- The Addition of an Approvals window panel to workflow. It can show approvals for all companies for the logged in user. It also includes the ability to drill into the approval screen or to show the record pending approval.



- A Priority has been added to rules so when more than one rule executes on the same class at the same time you can now set the order in which this should happen. Also for conditions and actions (etc) within a rule you can sort the order in which they execute.

- Added the ability for email and SMS to get the address/number from a property on the object.

- Additional filters added to the approval screen, including:

- a) Checkbox to only show approvals that were approved/rejected by a delegate.
- b) Date filter for a particular range.
- c) Filter for who did the approval/rejection.

- 'Record selection criteria' has been added as an option on the 'Conditions' tab of a rule. This allows a user to test on attributes the class has as well as testing on attributes it has a reference to or within a collection that class has. It includes 'Sum', 'Count', 'Min', 'Max' and 'Avg' functions. It also has the ability to test a date attribute to today +/- x days.

- New Standard Rules have been added to many classes.

- A General Ledger chart matrix definition, generation and validation function added.