VERSION 3.0 MARCH 6, 2024

Apps for Greentree

ACTIVE DIRECTORY INTEGRATION

APP NUMBER: 010044

Powered by:

MYOB Greentree

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FEATURES

1. Active Directory Integration.

This App integrates Greentree with Windows Active Directory allowing secure Single Sign on using a user's Domain user.

Four new options are available on the User preferences screen under the Active Directory Tab. These options may only be configured by the *Super* user.

2. Microsoft Entra ID Integration.

This App also integrates Greentree with Microsoft Entra ID (formerly Azure AD) allowing secure Single Sign on using modern web authentication provided by Microsoft.

If this option is used Greentree will always authenticate the current Windows user using the security configured in Microsoft Entra ID, however the first two options below are used for access to Greentree.

This option requires the registration of a new enterprise application in MS Entra and entering identity information in the App control options. Instructions on setting up a new application are at the end of this document.

OPTIONS

- 1. None
 - Greentree username and password are used. No checking against Active Directory is done. If Microsoft Entra ID has successfully authenticated the user, this option will prevent single sign-on

2. Use Windows Login (bypass GT password check)

 This option provides secure single sign-on. Greentree checks the currently logged on user is a valid user in the same Domain as the Greentree server **OR** Greentree uses Microsoft Entra ID to authenticate the current user. It then logs the user on to the matching Greentree user.

If this fails, the normal Greentree username and password prompt is used for backup.

3. Check Login on Active directory

- Greentree prompts the user to enter their Greentree username and password. Greentree checks that the provided user matches a valid Windows user.
- This option is only considered secure if the Disable Server Side User Validation option (shown in the App Configuration section below) is not ticked. This ensures that the user is validated against the same Domain that the Greentree server is using.

4. Check Login against current Active Directory User

• Greentree prompts the user to enter their Greentree username and password. Greentree checks that the provided user matches the current logged on Windows user. • This option is only considered secure if the Disable Server Side User Validation option (shown in the App Configuration section below) is not ticked. This ensures that the user is validated against the same Domain that the Greentree server is using.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.
- Before installing and configuring the App, ensure that the Greentree username for each user is identical to his or her Windows Domain username, or identical to their account name (or one of the other identifier fields) in Microsoft Entra ID.
- Do not enable the App for any user that also needs to log in as the Super user as it will prevent them from being able to do so.
- The *Super* user Greentree account cannot be configured to use Active Directory Integration as a login but must be selected as a User in | System | Apps For Greentree | Apps Module Control | Active Directory Integration App| Edit Users
- Windows Domain accounts are maintained by the network administrator within Active Directory. The network administrator should be consulted before configuring this App for Greentree.
- Microsoft Entra ID configuration, including user accounts, is maintained by an administrator user to the Microsoft Azure platform your organisation. This administrator should be consulted for assistance in configuring this app and Microsoft Entra ID.
- This App provides Active Directory or Microsoft Entra ID integration for access to the core Greentree system. It does not provide Active Directory integration for external functionality such as FREE, ODBC, eModules, WebView and Greentree IQ, for which existing usernames and passwords are still required.

OTHER REQUIREMENTS

Greentree Modules: None.

Associated Apps: None.

USER INSTRUCTIONS

OPTIONS

Greentree will behave according to which Option has been set for your user account under Other Greentree Configuration:

OPTION 1. None

- Click on the desktop icon to launch Greentree.
- If using Microsoft Entra ID integration, the standard web authentication process will be used, however once authenticated the normal Greentree login form will be shown.
- Enter your Greentree username and password.

OPTION 2. Use Windows Login

- Click on the desktop icon to launch Greentree.
- If the user who is logged in to the computer is a valid Active Directory user Greentree will automatically log on as the Greentree user with a matching username.
- If using Microsoft Entra ID integration, the standard web authentication process will be used, and once authenticated Greentree will automatically log on as the matching Greentree user.
- If this fails the Greentree username and password prompt will appear.

OPTION 3. Check Login on Active directory

- Click on the desktop icon to launch Greentree.
- Enter your Greentree user name and password into the Greentree login screen and select the company you wish to log into.
- If your Greentree username matches an active Windows Network account ID, you will be logged in to Greentree.

Note: If there is no matching and active Windows Network account ID, you will receive this message:

This user is not valid in Active Directory

OPTION 4. Check Login against current Active Directory User

- Click on the desktop icon to launch Greentree.
- Enter your Greentree user name and password into the Greentree login screen and select the company you wish to log into.
- If your Greentree username matches an active Windows Network account ID <u>and</u> if you are logged in to the network on that PC or terminal server session using that Windows account, you will be logged in to Greentree.

Note: If there is no matching and active Windows Network account ID, you will receive this message:

This user is not valid in Active Directory

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App.

APP INSTALLATION

- 1. Log into Greentree as the Super user
- 2. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 3. Either enter the New Registration Codes supplied and click Install App or click the Check for Purchased Apps button to display a list of apps recently purchased or renewed to install in bulk.

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l	Enter N	ew Registration Code	Install Ap	op	Check for Purchase	d Apps De	elete Inactive/	Expired Apps	Uninstall Apps For Greentree
ľ	_	Filter Apps	view Aud	IIS					
L	Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count	A
L	000000	Apps For Greentree Form	App Usage information on Forms	•	31 December 2099	0-Edit Users	5		
L	010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Or	d 🔽	23 June 2020	100-Edit Use	8		1
L	010002	IN Reorder Workbench	Inventory Reorder Workbench	•	25 June 2021	100-Edit Use	e Change		1
L	010003	IN Min/Max Workbench	Inventory Min/Max Workbench	•	30 June 2040	100-Edit Use	e Change		1
L	010004	AR Sales History Tab	Tab in Customer maintenance to display Sales Hi	sI 🔽	31 December 2099	100-Edit Use	8		
L	010005	AR/IN Pricing Tab	Pricing Tab in Customer and Inventory Maintenar	c 🔽	28 May 2021	0-Edit Users	5]
	010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	•	31 December 2099	100-Edit Use	e Change		

4. Select/Highlight the Active Directory Integration App.

GT			Apps For Greentree	Module C	ontrol				_ 0	×
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Enter N	ew Registration Code		Install App			Delete Inac	tive/Expired Apps	Uninstall A	pps For Green	ntree
	Filter Apps		View Audits							
Code	Name	Description			Active	Expiry Date	User Count	Settings	App Count	A .
000000	Apps For Greentree Form	App Usage information on Form	S		v	31 December 2099	0.Edit Urerr			
010001	AR Sales Orders Tab	Tab in Customer maintenance to	o display Sales Orders		v	31 December 2099	100-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workbench			v	31 December 2099	Too-Luit Osers	Change		

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

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User Count Limit	100	Users Teams			
User	e-Computers - Australia	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07) e
All Users					
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001 EDI HN		V			

- 6. Once you have selected the users, Save the settings, and Close the window.
- 7. Save and Close the Module Control form.

APP CONFIGURATION

- 1. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 2. Select/Highlight the Active Directory Integration App.
- 3. Click on the Change button.

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	Enter N	ew Registration Code		Install App	C	Check for Purchase	d Apps	Dele	ete Inactive/	Expired Apps	Uninstall Ap	ps For Greentree	n	Verde G	oroup Nev
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	000000	Apps For Greentree Form	App Usage information on Forms	~		31 December 2099	0-Edit Us	ers					t	Verde G	iroup Nev
	010006	Transaction UDF	Tab in Transaction Entry for Custo	m UDF Fields 🔲		31 December 2049	100-Edit U	Use	Change						
	010008	Utility System Scripts	A collection of useful scripts for im	porting and expc 🔽		31 December 2049	100-Edit U	Use	Change		1				
	010010	Email Copy Invoices	Functionality to email customer inv	roice copies 🛛 🔽		31 December 2049	100-Edit U	Use	Change	GT		AD Login Co	-		
	010014	WebView CRM Maintena	Webview CRM Maintenance page	es 🗖		31 December 2049	100-Edit U	Use	Change			AD Login Co	mator		
	010032	AP Supplier Purchase Or	Tab in AP Supplier maintenance to	o display Purcha 💌		31 December 2049	24-Edit U	sers				3 85		0	∽¶ AFG (
	010036	Schedule Standing Tran	New task to schedule standing tra	insactions for the 🗹		01 December 2049	100-Edit U	Use							
	010040	Audit Logging and Repo	Tracking of changes to specified p	properties on Gre 🗹		31 December 2049	100-Edit U	Use	Change		Disable Server Side User Validation				
	010043	A&A Helper	Additional A&A functionality includ	ing programmatic 🗹		23 May 2050	0-Edit Us	ers	Change		Enable Debugging				
	010044	AD Integration	Active Directory Integration			31 December 2049	100-Edit U	Use	Change		induit bebugging				
	010047	Enquire/Print GL Journal	Functionality to view or print GL Jo	ournals from trans 🔽		31 December 2049	100-Edit				Enable Microsoft E	Entra ID Integration	1		
	010055	Invoice Preview	Functionality to preview invoices	•		31 December 2049	100 wit l	Use		Mi	crosoft Entra ID	Configuration			
	010060	Import\Export Expolorer (Functionality to import and export I	Explorer Queries 🔽		31 December 2049	100-Edit U	Use		т	enant ID	3b08			6de
	010070	Alert Rule Utility	Functionality to enhance Alert Rul	es 🔽		31 December 2049	100-Edit U	Use	Change		lient ID	917a.			974
	010071	Email Attachment Proces	Functionality to read emails and ex	ktract Attachmen 🗔		31 December 2049	0-Edit Us	ers	Change			orrei Anvelate	0/4		0/4
<	010072	JC Printed Invoice	Functionality to allow free format Ir	nvoice definition 🔽		31 December 2049	100-Edit U	Use		E	ntra Match Field	Any field			
	010080	Advanced Exception Ha	This App will allow users to have a	another exception 🔽		31 December 2049	100-Edit U	Use	Change						
88	010083	Email tracker	Tracks all emails sent from Greent	ree and provides 🗹		31 December 2049	100-Edit U	Use	Change						

Disable Server Side User Validation	This option removes the security validation on the server and means the user is not validated against the same Domain that the Greentree server is using. Only use with caution.
Enable Debugging	Tick to enable debugging to track reasons for login failures.
Enable Microsoft Entra ID integration	Turns on authentication using security information configured in Microsoft Entra ID.
Tenant ID	The Tenant ID from Microsoft Entra ID – Organisation Overview.
Client ID	The Application ID from Microsoft Entra ID – App Registration.
Entra Match Field	Specify a particular field from Microsoft Entra ID that will be used to match the Greentree username (or email address).

OTHER GREENTREE CONFIGURATION

- 1. Select the menu item | System | System Setup | User Maintenance |
- 2. Select the User you want to change settings for and click on the More Preferences button

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		₩⊖₩	Q 🖋 🕑		⁄ئ 🖓 🛃	8 🗥 🕐
Name	April Smith				a.,	
Teamn	ame	Select				
More	Preferences	J			. ,	Add <u>T</u> eam
Rea	ady			User 4 of 13		

- 3. Click on the Active Directory tab
- 4. Click on the Active Directory option that will apply for the user. This setting is used for all companies that were configured for the user at step 5 of the App Installation section above.

G User Preference M	Maintenance					
Privileges	Business Ar	nalyst	Verd	e Defaults		Attachments
Screen forms Print I	forms Access	Data entry	Verde	Apps for Green	tree	Queue / Approval
General Active [Directory Aud	lit Security	Email Sign	lature Appr	ovals	Menu security
 None Use windows login (b) Check Login on Activ Check Login against 	y pass GT password ve Directory current Active Direc	d check) story User				

5. Save the settings, using the save (disk) icon in the header and Close the window.

MICROSOFT ENTRA ID CONFIGURATION

Configuration of Entra ID through the Microsoft Azure portal should be performed by a user with administrator permissions. Log in to the Azure portal for the tenant you will be setting up.

- 1. Select the menu item $| \equiv |$ Microsoft Entra ID |
- 2. An overview of the organisation details is shown. Copy the Tenant ID that is shown on this page and paste in the App Configuration form in Greentree.

■ Microsoft Azure		$\mathcal P$ Search resources, services, and docs (G
Home >		
Verde Group New Z Microsoft Entra ID	ealand Ltd Overvio	ew
«	🕂 Add \vee 🔅 Manage tena	nts 🖸 What's new 🛛 😨 Preview feature
i Overview		
Preview features	Azure Active Directory is no	ow Microsoft Entra ID. Learn more
X Diagnose and solve problems	Overview Monitoring F	Properties Recommendations Tutoria
Manage	Search your tenant	
🚨 Users		
🐣 Groups	Basic information	
External Identities	Name V	/erde Group New Zealand Ltd
Roles and administrators	Tenant ID 3	8b08 6de 🗋

3. Select the menu item $| \equiv |$ App registrations |

Werde Group New 2	Zealand Ltd App registrations 🛷 …
 Overview Preview features Diagnose and solve problems 	 + New registration Endpoints Troubleshooting Refresh Starting June 30th, 2020 we will no longer add any new features to Azure Act no longer provide feature updates. Applications will need to be upgraded to
Manage	All applications Owned applications Deleted applications
 Groups External Identities 	Start typing a display name or application (client) ID to filter these r
 Roles and administrators Administrative units 	
 Delegated admin partners Enterprise applications 	
 Devices App registrations 	

4. Click on the New registration button. Enter the application details. Note the name of the application is not important. Select the first option ("single tenant") and Enter https://login.microsoftonline.com/common/oauth2/nativeclient as the Redirect URI.

Home > Verde Group New Zealand Ltd | App registrations >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Greentree OnPremise

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (Verde Group New Zealand Ltd only Single tenant)
- O Accounts in any organizational directory (Any Microsoft Entra ID tenant Multitenant)
- Accounts in any organizational directory (Any Microsoft Entra ID tenant Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- O Personal Microsoft accounts only

Help me choose...

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Public client/native (mobile ... 🗸 https://login.microsoftonline.com/common/oauth2/nativeclient 🗸

Click on the Register button to save the application.

 \checkmark

5. On the application details page Copy the Application (client) ID that is shown on this page and paste in the App Configuration form in Greentree.

Home > Verde Group New Zealand Ltd App registrations >									
Greentree OnPremise 🖉 🐇									
✓ Search «	间 Delete 🕀 Endpoint	ts 💀 Preview features							
Overview	🚺 Got a second? We wou	uld love your feedback on Microsoft id	entity platform (previ						
🗳 Quickstart									
🚀 Integration assistant	∧ Essentials								
Manage	Display name	: Greentree OnPremise							
Branding & properties	Application (client) ID	: 817e	874						
Authentication	Object ID	: 0378	850						
Authentication	Directory (tenant) ID	: 3b08	6de						
📍 Certificates & secrets	Supported account type	es : My organization only							

6. Select the menu item | Enterprise applications | From the list find the new application and select it to show the overview page.

```
Home > Verde Group New Zealand Ltd | Enterprise applications > Enterprise applications | All applications >
```

₽	Greentree OnPre	mise Overview	
III Ma III A A A A A A A A A A A A A	Overview Deployment Plan Diagnose and solve problems nage Properties Owners Roles and administrators Users and groups	Properties Image: One of the second secon	
 Э ⇒ ⇒ ⇒ ⇒ ∞ ∞ 	Single sign-on Provisioning Application proxy Self-service Custom security attributes	Assign users and groups Provide specific users and groups access to the applications Assign users and groups	٢

7. Select the menu item | Properties |

Set the following properties:

Enabled for users to sign-in? Yes

Assignment required? Yes

Visible to users? No

Home > Verde Group New Zealand Ltd | Enterprise applications > Enterprise applications | All applications > Greentree OnPremise | Users and groups >

Properties Enterprise Application					
🔚 Save 🗙 Discard 💼 Delete 🔗 Got feedback?					
View and manage application settings for your organization. Editing properties like display information, user sign-in settings, and user visibility settings requires Global Administrator, Cloud Application Administrator, Application Administrator roles. Learn more.					
If this application resides in your tenant, you can manage additional properties on the application registration.					
Enabled for users to sign-in? ①	Yes No				
Name * (i)	Greentree OnPremise		\checkmark		
Homepage URL 🔅					
Logo 🛈	GT				
	Select a file		E 1		
Application ID ③	817ec	1874			
Object ID (i)	bdfc1	b4e			
Assignment required? (Yes No				
Visible to users? (i)	Yes No				

8. Assign users and/or groups to the application for access.

Select the menu item | Users and groups |

Home > Verde Group New Zealand Ltd | Enterprise applications > Enterprise applications | All applications > Greentree OnPremise

Enterprise Application					
~	🕂 🕂 🕂 🕹 🕂 🕹 Add user/group				
👯 Overview					
Deployment Plan	The application will not appear for assigned users within My Apps. Set 'visible to users?' to yes in pr				
X Diagnose and solve problems	Assign users and groups to app-roles for your application here. To create new app-roles for this ap				
Manage					
Properties	First 200 shown, to search all users & gro				
🐣 Owners	Display Name Object Typ				
🕹 Roles and administrators	No application assignments found				
Users and groups					

9. Click on the Add user/group button. Select the users and/or groups to assign and then click on the Assign button.

Home > Verde Group New Zealand Ltd Enterprise Add Assignment	Users and groups				×		
Verde Group New Zealand Ltd Users and groups None Selected	i) Try chang	ging or adding filters if you don't	t see what you're looking f	or.		Selected (3) Reset	
Select a role Default Access	Search Search X			A a	Ē		
	All Users	Groups				C d	Ī
		Name	Туре	Details		G g	Ū
	P 🚨	с	User	cl			

10. Select the menu item | Permissions |

On this screen click the Grant admin consent... button to enable authentication without requiring individual administrator approval for each user.

Home > Verde Group New Zealand Ltd | Enterprise applications > Enterprise applications | All applications > Greentree OnPremise

Greentree OnPremise | Permissions

	Enterprise Application					
		Refresh V Review permissions				
•	Overview					
	Deployment Plan	Permissions				
×	Diagnose and solve problems	Below is the list of permissions that have been granted for your organization. As an administrator, you ca grant permissions directly to this app (app permissions). Learn more.				
Ma	inage					
	Properties	You can review, revoke, and restore permissions. Learn more.				
28	Owners	To configure requested permissions for apps you own, use the app registration. Grant admin consent for Verde Group New Zealand Ltd				
2	Roles and administrators					
2	Users and groups					
€	Single sign-on	Admin consent User consent				
٢	Provisioning	∀ Search permissions				
83	Application proxy	API Name \uparrow_{\downarrow} Claim value \uparrow_{\downarrow} Permission				
0	Self-service	No admin consented permissions found for the application				
2	Custom security attributes					
Se	curity					
•	Conditional Access					

🔒 Permissions