VERSION 1.0 SEPTEMBER 11, 2019

# Apps for Greentree

# **POSTING PERIOD AUDIT**

APP NUMBER: 010151

Powered by:

**MYOB** Greentree

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# **FEATURES**

#### 1. Audit when Posting periods are changed

This app gives you the ability to view when posting periods were changed, by who and from what period to what period. There is a report to give you this detail for the specific company you are logged into.

## 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.

#### **OTHER REQUIREMENTS**

**Greentree Modules:** One or more of the following: Accounts Payable, Accounts Receivable, General Ledger, Inventory, Job Costing or Fixed Assets.

Associated Apps: None

# **USER INSTRUCTIONS**

#### **VIEW THE POSTING AUDIT REPORT**

The report can be found from the standard Other Reports menu.

Reports | Other Reports | Posting Period Audit Report

Choose the Posting Period Report and click on Print.



Type refers to what module you would like to see (AP, AR, GL, IN, FA, JC, TX). To view all, leave this blank. You can also specify the date range you would like to report on:

			_	
Select profile	Default Profile			$\sim$
Set parameters	Parameter	Value		
	Туре			Τ.
	Date From	01/01/15		
	Date To	31/12/25		
Set trees for				~
Set trees for Main tree		~	Set Branches	~
Set trees for Main tree Selection trees			Set Branches Change	~
Set trees for Main tree Selection trees Output report to	EMail	 ✓	Set Branches Change	~
Set trees for Main tree Selection trees Output report to Email address	EMail	✓	Set Branches Change	~
Set trees for Main tree Selection trees Output report to Email address Print As	EMail Text V Graphics	 ✓	Set Branches Change Show Defin	~ itior
Set trees for Main tree Selection trees Output report to Email address Print As	EMail Text Graphics	√   √	Set Branches Change	~ itior

# Example of report output:

11-Sep-2019 e-Computers - NZ					Page No	Page No 1	
		Posting Peri	od Audit Report for: 10	0 September 2019 to 31 De	ecember 2025		
Module	Date	Calendar	Type of Change	From	То	Updated By	
AP	11/09/19	MARCH	First	July [2012/2013]	August [2019/2020]	SUPER	
AP	11/09/19	MARCH	Current	September [2017/2018]	September [2019/2020]	SUPER	
AR	11/09/19	MARCH	First	September [2019/2020]	June [2019/2020]	Amanda	
AR	11/09/19	MARCH	Last	October [2019/2020]	September [2019/2020]	Amanda	
AR	11/09/19	MARCH	Current	September [2019/2020]	August [2019/2020]	Amanda	
FA	11/09/19	MARCH	First	August [2019/2020]	July [2019/2020]	Amanda	
FA	11/09/19	MARCH	Last	October [2019/2020]	November [2019/2020]	Amanda	
FA	11/09/19	MARCH	Current	September [2019/2020]	August [2019/2020]	Amanda	
GL	11/09/19	MARCH	First	August [2007/2008]	August [2019/2020]	George	
GL	11/09/19	MARCH	Last	March [2023/2024]	November [2019/2020]	George	
GL	11/09/19	MARCH	Current	June [2019/2020]	September [2019/2020]	George	
IN	11/09/19	MARCH	First	August [2019/2020]	September [2019/2020]	George	
IN	11/09/19	MARCH	Last	October [2019/2020]	September [2019/2020]	George	
JC	11/09/19	MARCH	Last	October [2019/2020]	November [2019/2020]	SUPER	
JC	11/09/19	MARCH	Current	October [2019/2020]	September [2019/2020]	SUPER	
TAX	11/09/19	MARCH	First	September [2019/2020]	August [2019/2020]	SUPER	
TAX	11/09/19	MARCH	Current	September [2019/2020]	August [2019/2020]	SUPER	

# **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. Enter the New Registration Codes supplied and click Install App

GT	GT Apps For Greentree Module Control _ 🗆							_ □ ×	
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Enter N	ew Registration Code		<u>I</u> nstall Ap	р	]	Delet	e Inactive/Ex	pired Apps	Uninstall Apps For Greentree
	Filter Apps		<u>V</u> iew Audi	its					
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count	~
000000	Apps For Greentree Form	App Usage information on Forms		~	31 December 2099	0-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workbench		~	31 December 2099	100-Edit Use	Change		
010003	IN Min/Max Workbench	Inventory Min/Max Workbench		~	09 September 2099	100-Edit Use	Change		
010004	AR Sales History Tab	Tab in Customer maintenance to o	display Sales His		31 December 2099	100-Edit Use			
010005	AD Drining Tab	Tab in Customer maintenance to c	liantau Driainn		21 December 2000	400 Edit Lloo			

#### 4. Select/Highlight the Posting Period Audit App.

GT			Apps For	Greentree	Module Control
		: 40			
Enter New Registration Code			<u>I</u> nstal	І Арр	
	Filter Apps		<u>V</u> iew /	Audits	
Code 🔊	Name	Description		Active	Expiry Date
010151 Posting Period Audit		Audit when Posting periods are changed.			29 August 2020

5. Click on the Edit Users button and select the users who will have access to run the Posting Period Audit Report and for which companies. All users will be audited on, regardless if they are selected in the setup or not.

GT		_ 🗆 X			
	0 11 0	H @			₽ <i>₽₽</i> ₫
User Count Limit	Unlimited				
User	e-Computers - Australia	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers -
All Users			<b>V</b>	<b>V</b>	
001 EDI AK			<b>V</b>	<b>V</b>	
001 EDI HN			<b>V</b>	<b>V</b>	
ADMIN			<b>V</b>	<b>V</b>	
admin1			<b>V</b>	<b>v</b>	
Amanda			<b>V</b>	<b>V</b>	

- 6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.
- 7. Save and Close the form.