

Apps for Greentree

EMAIL TRACKER

APP NUMBER: 010083

Powered by:

MYOB Greentree

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FEATURES

1. Email Tracker

The Email Tracker App archives emails that are sent through the Greentree Email Task Queue or from the **Send Multiple Copy Invoices** App (010010) and stores them along with their attachments.

You can access the Email Tracker directly from the **Enquiry** menu plus the App adds an **Email Tracker** tab to the relevant maintenance and transaction forms.

The **Resend** button makes it simple to re-send any emails that have failed, have gone to the wrong recipient or simply need to be sent again.

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.
- Emails will be Tracked from the time that the App is registered. The App does not build an archive of emails sent before the App was enabled.
- Greentree Task and Email Processor must be re-started after installation and configuration of the App for it to work, emails sent prior to a re-start will fail.

OTHER REQUIREMENTS

Greentree Modules: Accounts Receivable, Accounts Payable, Purchasing

Associated Apps: 010010 Send Multiple Copy Invoices from Customer Maintenance / Enquiry

USER INSTRUCTIONS

USING THE EMAIL TRACKER

There are two options for opening the Email Tracker:

Option 1: Click on the menu item: [Enquiry | Email Tracker](#)

Option 2: You can also see the Email tracker records from the transaction or master file that they were created from, for a more specific search. This includes;

- AR Customer Maintenance/Enquiry
- AR Invoices and credit notes
- JC AR Invoices and Credit Notes – these are not available from the job
- AP Supplier Maintenance/Enquiry
- AP invoices
- PO Purchase order and PO Receipts
- JC Jobs – job cards

Example:

Click on the menu item: [Data Entry | Accounts Receivable | Customer Maintenance](#)

The screenshot shows the 'Customer Maintenance' software interface. The 'Email Tracker' tab is selected. The search criteria are: Code 1000, Alpha KANGAN, Name Kangan Education Unit. The displayed currency is set to Local. The date range is from 16/08/2017 to 16/08/2018. The table below shows the results of the search.

+ Timestamp	TO	CC&BCC	Subject	Message	Sent	Error	Type	Transacti	Ref\Code
18/04/2018	sam@verde.co.nz		e-Computers - NZ.	<p>Verification Re	true		0 Resent Base Form	AR Invoic	10
12/02/2018	suzanne@verde.co		e-Computers - NZ -		true		2	JC AR Inv	0
09/02/2018	suzanne@verde.co		e-Computers - NZ -		true		2	JC AR Inv	0
09/02/2018	suzanne@verde.co		e-Computers - NZ -		true		2	JC AR Inv	0
09/02/2018	suzanne@verde.co		e-Computers - NZ -		true		2	JC AR Inv	0
09/02/2018	suzanne@verde.co		e-Computers - NZ -		true		2	JC AR Inv	0

[Date From / To](#)

Select records within a date range.

Email address Select based on the email address used to send the email. This field can be left blank if you wish to see all email regardless of Email address. In addition, this can be done to select all the emails for a particular company. Example: If I put in @verde in the Email address field, it will display all emails send to anyone with @verde in their email address.

Search Click the **Search** button to find all emails that fall within the date range and have the specified email address

Table Columns

Timestamp	Displays the date and time the email was sent
TO	Shows the address / addresses to which the email was sent
CC /BCC	Shows the address / addresses to which the email was sent
Subject	Email subject set by the system when the email was generated
Message	The body text of the email
Sent	“true” if the email was successfully sent or “false” if the email failed
Error	The reason for the email failure e.g. <i>Invalid email address</i>
Attachments	The number of attachments for the email
Type	This shows if an App was used to generate the email
Transaction Type	Type of transaction the email was from
Ref/Code	The transaction or masterfiles reference/code

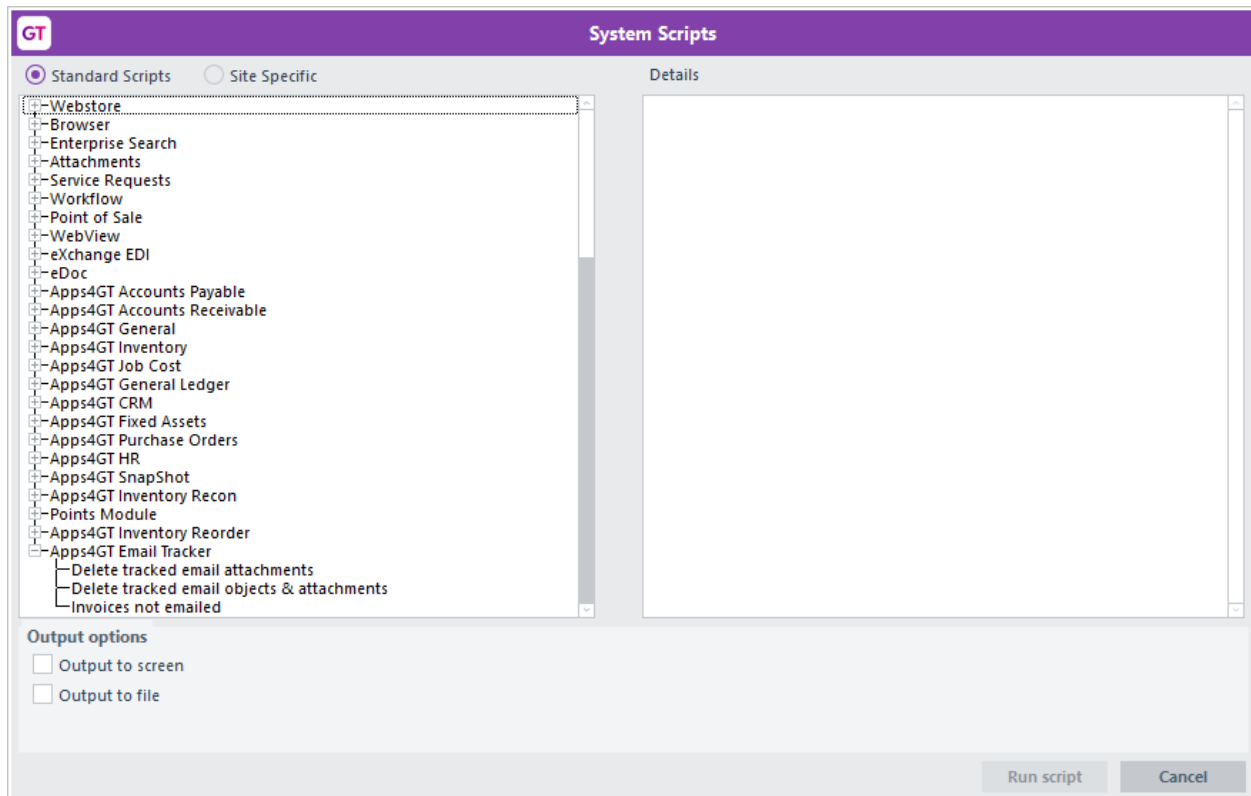
Resend Select an email by clicking on it in the table, then click on the **Resend** button to resend the email along with any associated attachments to the original recipients.

You can also change the email address or message in the fields at the bottom prior to re-sending.

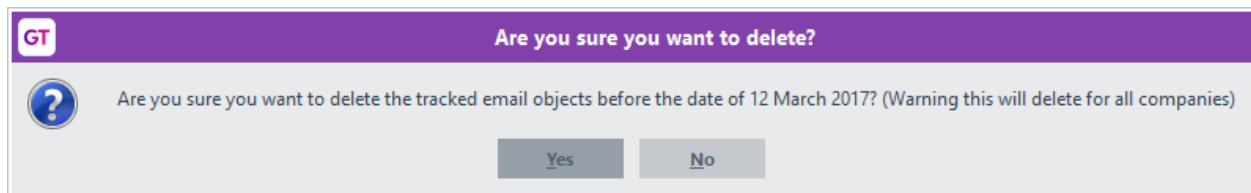
DELETING EMAIL TRACKER OBJECTS

If you send lots of emails and they have large attachments it can affect the size of the database and how long backups take. You can periodically delete either the attachments or the Tracker objects/notes using the system scripts

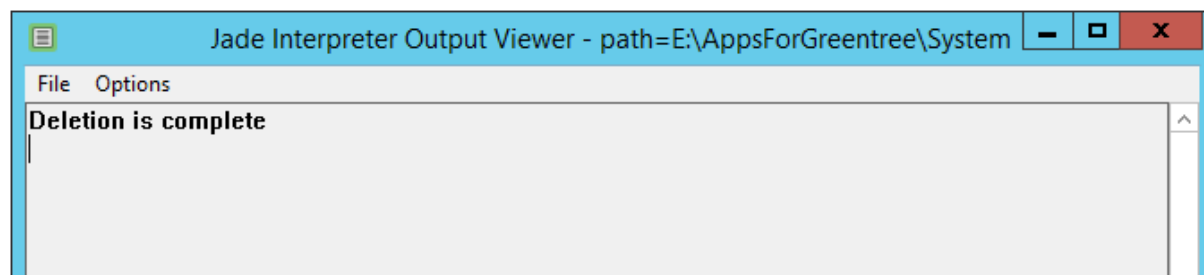
| [System](#) | [Utilities](#) | [System Scripts](#)



Click on the script and click the Run script button



You will be asked to confirm that you want to delete – the date will default based on the number of days specified in the App control and today.



Jade Interpreter will identify when the script is complete.

INVOICES NOT EMAILED

The App includes a script that can be used to detect invoices that appear to have been email as a result of the isPrinted flag being updated, either as a result of a user previewing an Invoice or when the email distribution process fails for some reason after Greentree has generated the invoice for distribution (possibly a task processor failure)

The script identifies all invoices within a date range or a range of invoice batches that Greentree believes have been emailed (isPrinted = true) and that have no Email Tracker record

The user also has the option to automatically reset the isPrinted property to false so the updated invoices can be redistributed via the normal process

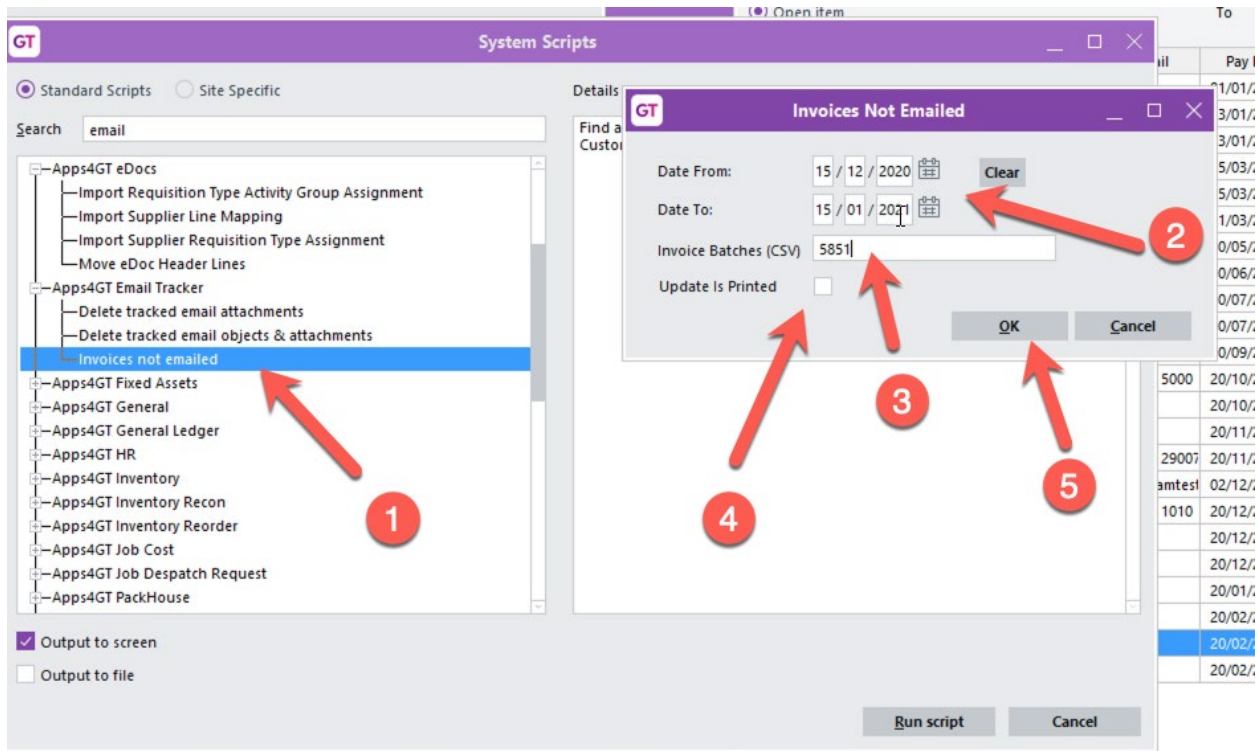
The script is accessed from System>Utilities>Apps4GT Email Tracker>Invoices not emailed

Press Run Script

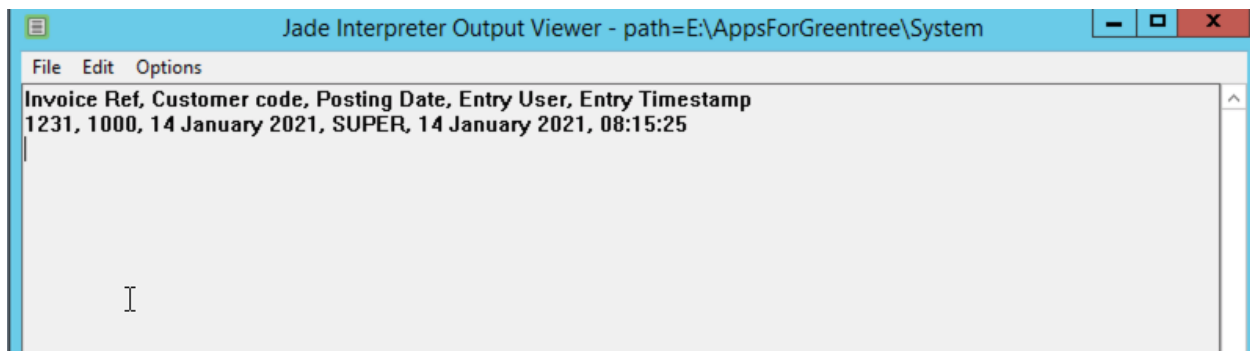
Enter a date range (2) or a comma separated list of invoice batches (3)

Tick Update is Printed (If you wish to reset the isPrinted property to false in re-distribute the invoice)

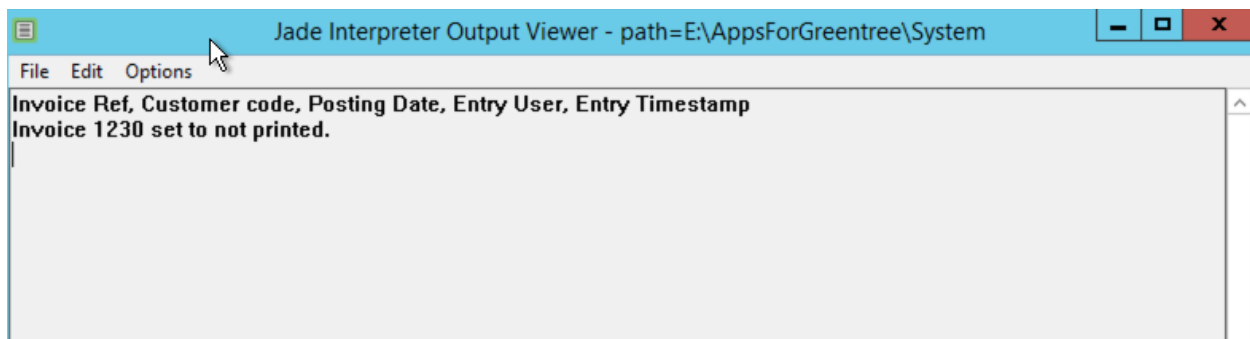
Press OK



If Update is Printed is left unticked, the script will open a Jade Interpreter Window and list the Invoices that appear not to have been emailed



If Update is Printed is unticked, the script will open a Jade Interpreter Window and list the Invoices updated as not emailed

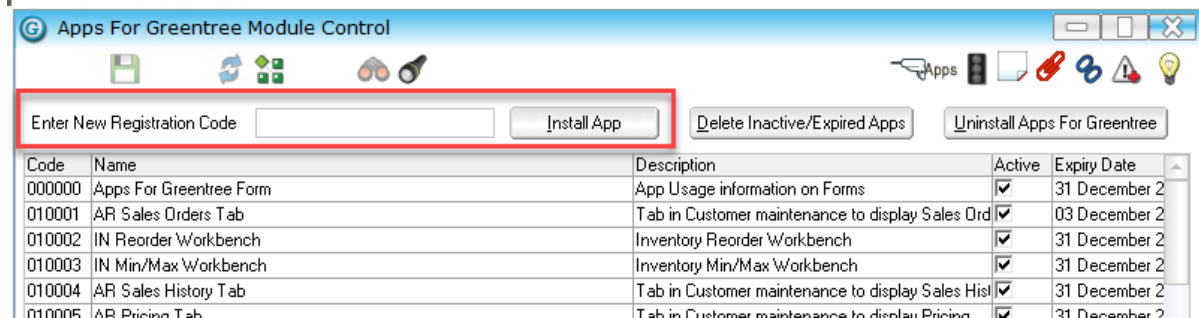


IMPLEMENTATION GUIDE

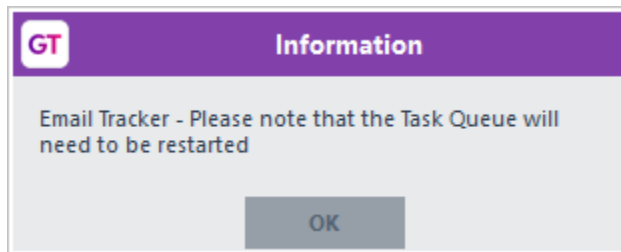
Please refer to the Important Notes section above before installing and configuring this App

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



4. Select/Highlight the Email Tracker App.
5. Click on the Edit Users button and select the users who will be configured to use Email Tracker, for which companies.
6. Save and Close the form.

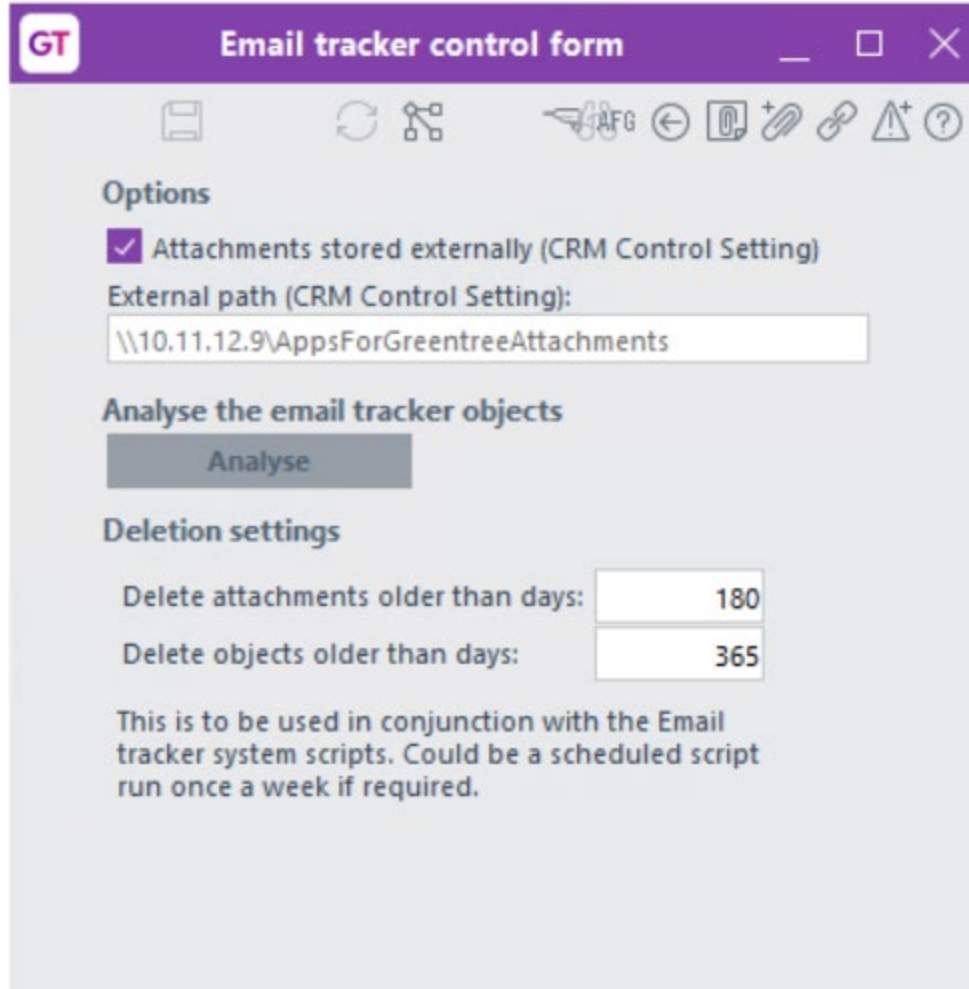


NOTE: Greentree Task and Email Processor must be re-started for this App to be used – you are given an information box about this.

APP CONFIGURATION

1. Select/Highlight the Email Tracker App.
2. Click on the Change button

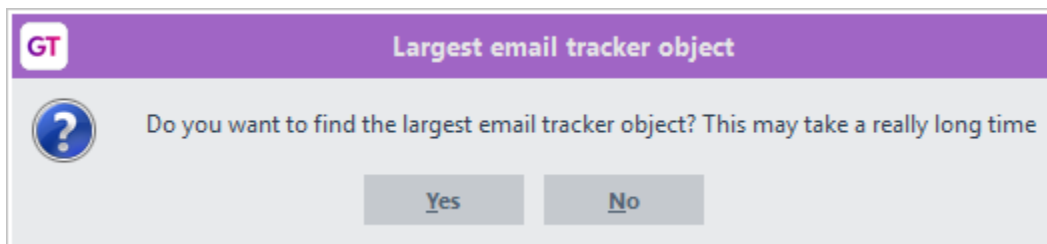
Set the number of days to retain attachments to emails for, and the number of days to retain the email tracker records. There are system scripts which you can run which delete old objects and attachments based on these settings.



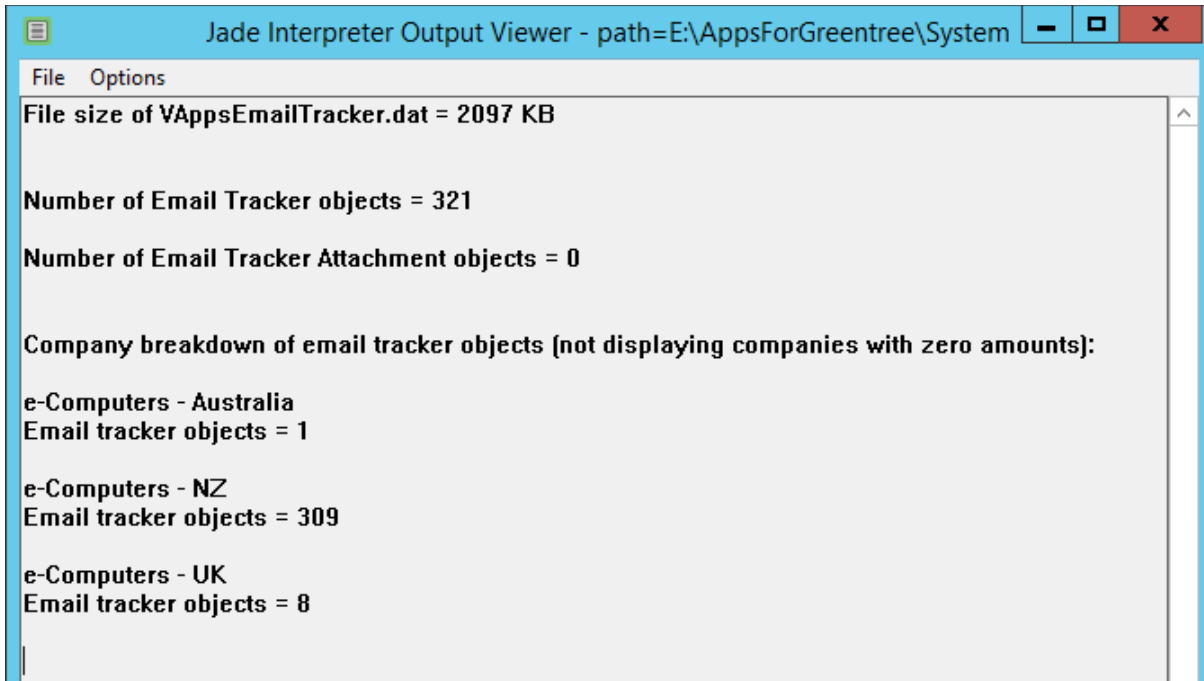
If you want to Analyse the emails being sent you can use the Analyse button from the above App control.

The Analyse button will review all Email Tracker objects in the database for all companies and provide a screen report of these.

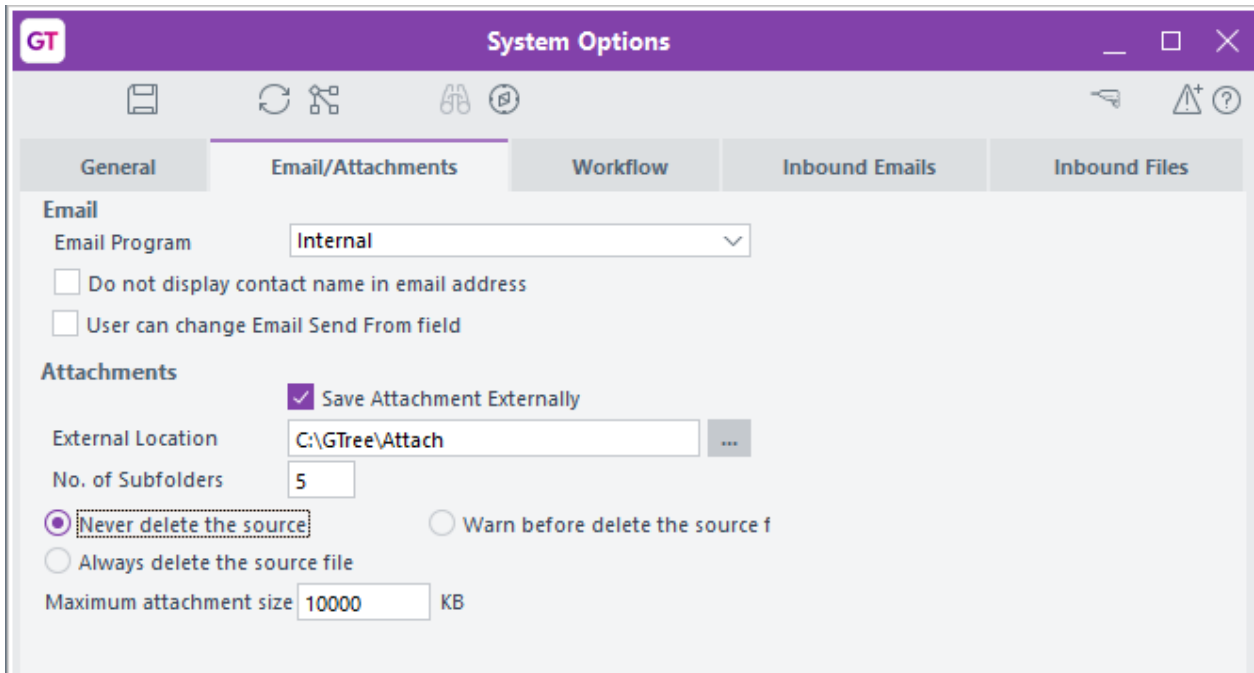
First you are asked if you want to know the largest object – this takes a bit longer to process.



The Jade Interpreter window will provide the details of objects in the different companies.



CRM ATTACHMENT STORAGE



CRM | System | System Options

The email tracker will use the same attachment setting as specified in CRM System Options.