



VERSION 1.0

JULY 9, 2018

# Apps for Greentree

## SUPPLIER PERFORMANCE SURVEYS

APP NUMBER: 010139

Powered by:

**MYOB** Greentree



**TABLE OF CONTENTS**

Features.....2  
    Important Notes.....2  
    Other Requirements .....2  
User Instructions .....3  
    SURVEY TYPE MAINTENANCE .....3  
    SUPPLIER MAINTENANCE.....4  
    Creating the survey .....5  
    WEBVIEW PAGE SETUP .....6  
    completing the survey questions .....9  
    VIEWING THE SURVEY RESULTS ..... 10  
Implementation Guide ..... 12  
    App Installation ..... 12

## FEATURES

### **Supplier Performance Surveys**

This app provides the ability to create a Survey that is distributed to your Staff with a list of questions about specific suppliers. The Staff must login to Webview to answer these questions, the results of which can then be viewed in a table and graph within Supplier Maintenance and Supplier Enquiry.

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### **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.

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### **OTHER REQUIREMENTS**

**Greentree Modules:** Financials, Webview, Alerts and Approvals

**Associated Apps:** None

## USER INSTRUCTIONS

### SURVEY TYPE MAINTENANCE

There are two Types of survey that can be setup via the AppsForGreentree Module Control.

Only one of each type should be created.

The Internal type is for questions that you wish internal staff members to answer in regards to the supplier's performance.

The External type can be used if you wish to ask the Supplier themselves to rate how they feel about your performance. (Note the supplier would need to have a Webview login in order to answer these questions).

The Ratings defined in the top table will be the answers available for selection for any questions of type 'Header Selection'.

Code:  Description:

Internal  External

Rating	Selection Text
1	Very dissatisfied
2	Somewhat dissatisfied
3	Neither satisfied nor dissatisfied
4	Somewhat satisfied
5	Very satisfied
6	

Number	Question	Type	Active?	Settings
1	Please select your Village	Selection	<input checked="" type="checkbox"/>	Settings
2	<b>Please rate your level of satisfaction with this supplier in the f</b>	Heading Only	<input checked="" type="checkbox"/>	
3	Understanding Your Needs	Header Selection	<input checked="" type="checkbox"/>	
4	Responsiveness	Header Selection	<input checked="" type="checkbox"/>	
5	Quality of Service	Header Selection	<input checked="" type="checkbox"/>	
6	Order/Booking Processing	Header Selection	<input checked="" type="checkbox"/>	
7	Resolving issues	Header Selection	<input checked="" type="checkbox"/>	
8	Communication	Header Selection	<input checked="" type="checkbox"/>	
10	Comments	Free Text	<input checked="" type="checkbox"/>	
11		Header Selection	<input checked="" type="checkbox"/>	

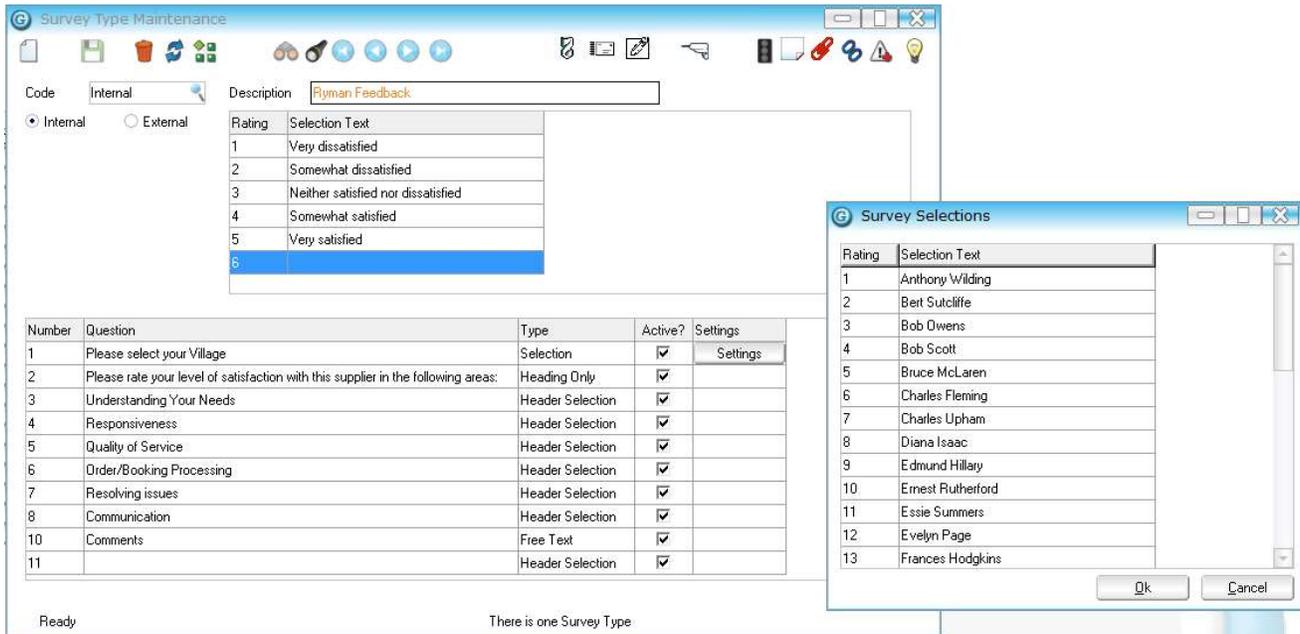
Ready Last Survey Type of 2

There are four different Question Types available, as shown in the drop down list above.

It is possible to define a line as being a 'Heading Only', and to create questions that require a Free Text answer rather than selection from a pre-defined list of answers.

Free Text questions are not mandatory, all selection questions must be answered by the submitting user.

If a Question is setup of Type 'Selection', then click the 'Settings' button on the line to define the list of possible answers for this question.



Note: If you wish to change the questions after prior surveys have been created, you must deactivate the old questions by unticking the 'Active' box on the line, and then create new questions. Do not change existing questions, or this will distort prior results.

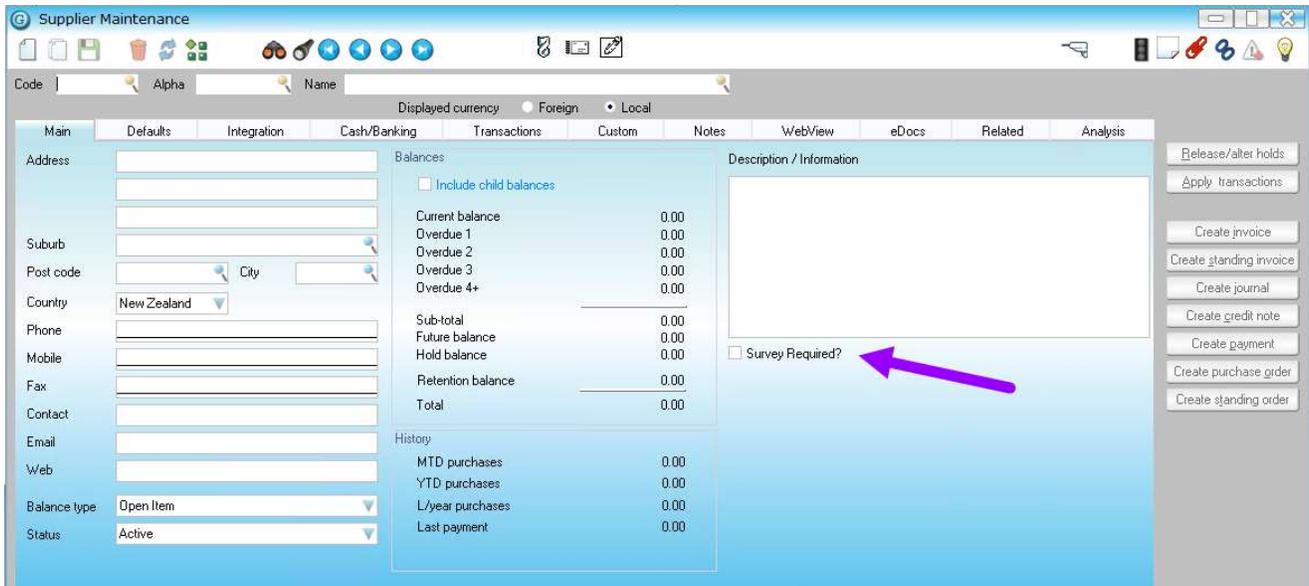
The order that the questions will be displayed in Webview is determined by the Question Number, and these can be renumbered if a change in order is desired, or when new questions are added.

## SUPPLIER MAINTENANCE

For those Suppliers that you require surveys to be completed on, tick the 'Survey Required' box in Supplier Maintenance.

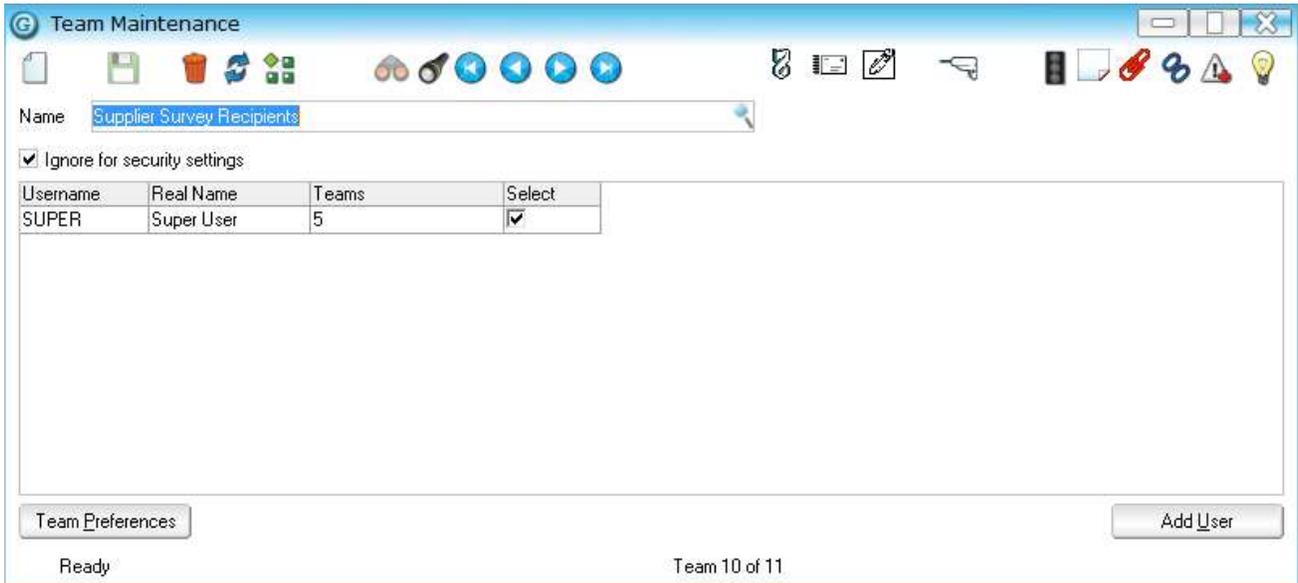
Note that the new 'Description/Information' field will be visible for all suppliers when this App is turned on, regardless of whether the supplier has this box ticked.

If any External Survey type has been setup, then an additional 'External Survey Email' field becomes visible in Supplier Maintenance. If external surveys are not in use, this field will not be visible.



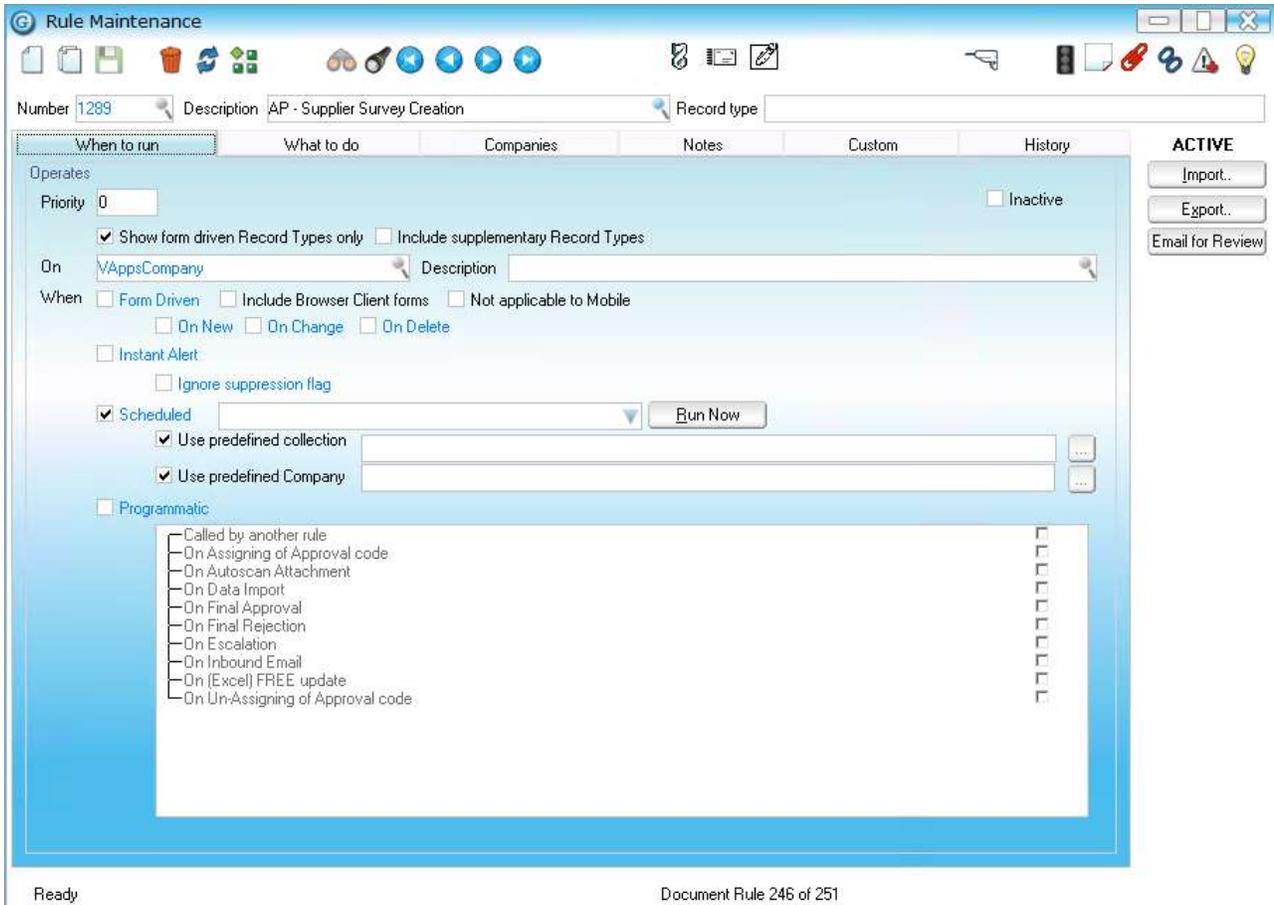
## CREATING THE SURVEY

You might like to create a User Team to define who the survey's should be created for.



Then a Workflow A&A Rule is required to create the Surveys for the required Suppliers and Users. You will need to work with your Greentree partner to have the custom script written for this rule.

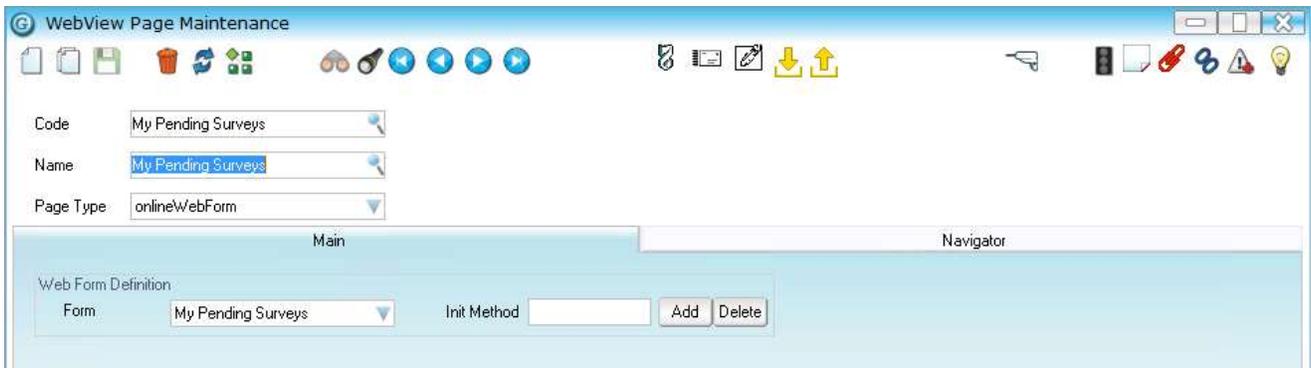
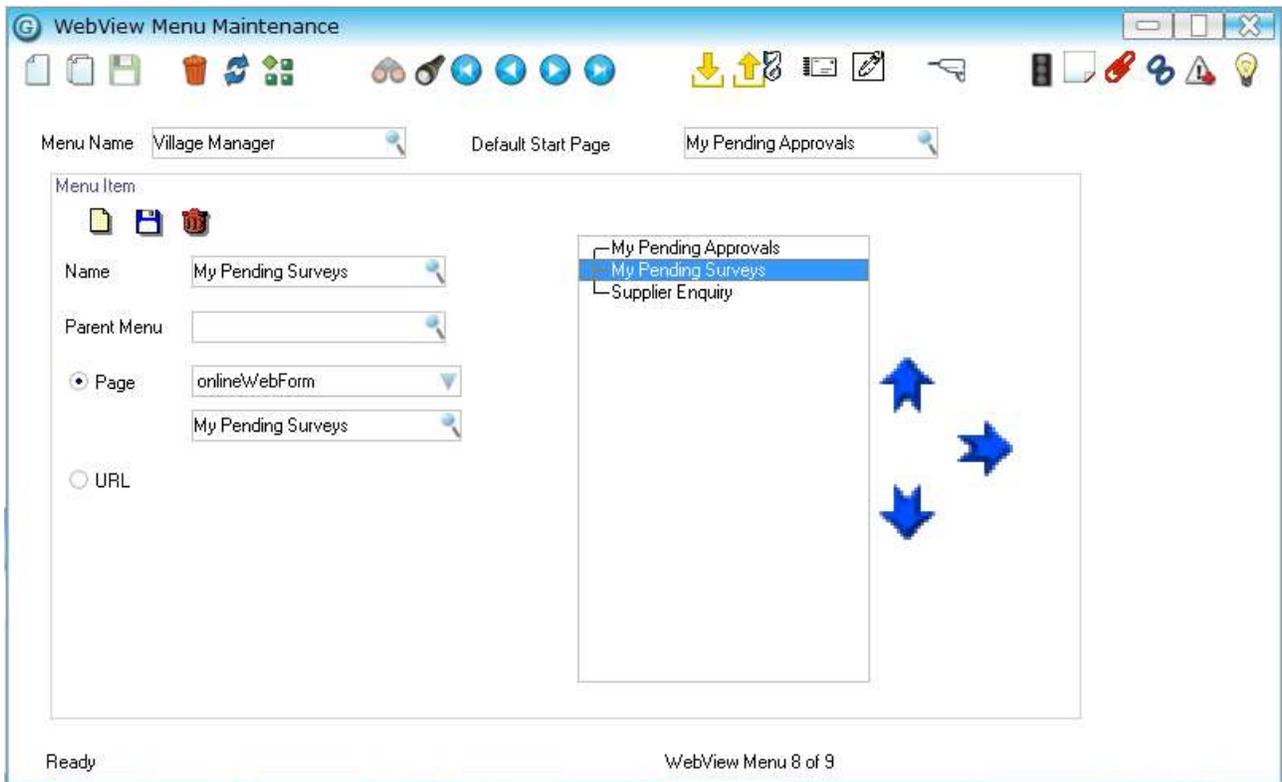
This allows you to customize who the surveys are sent to, when they are created, and how long users have to complete them before they expire.

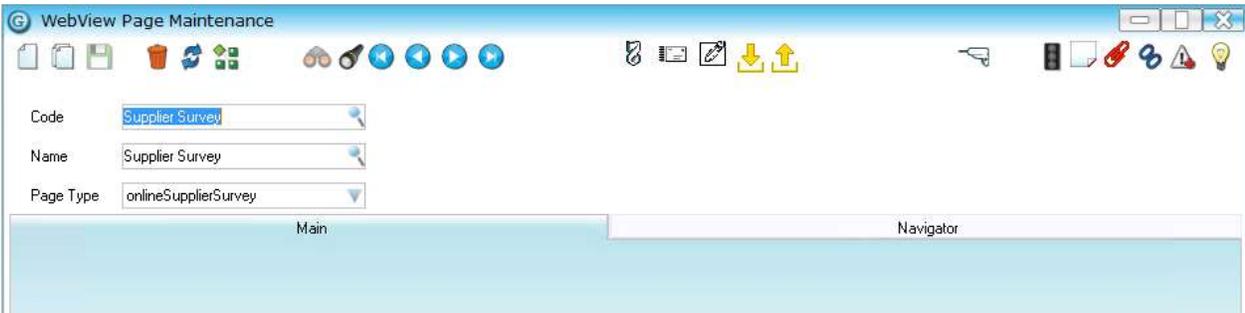
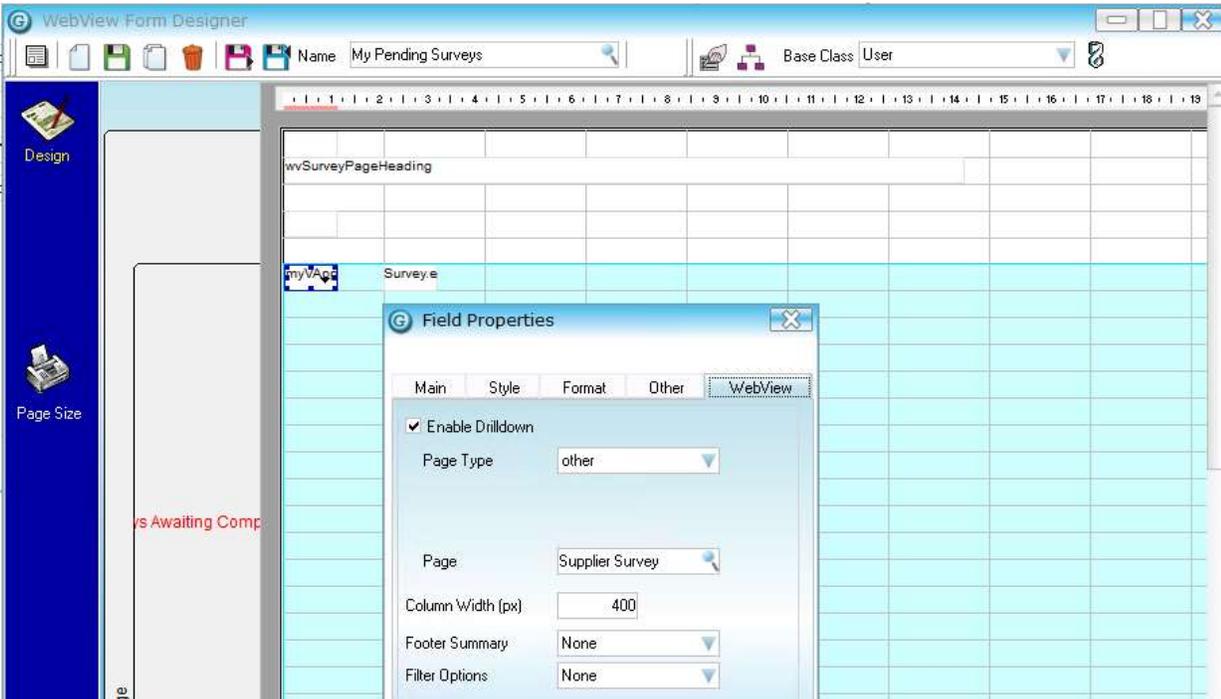
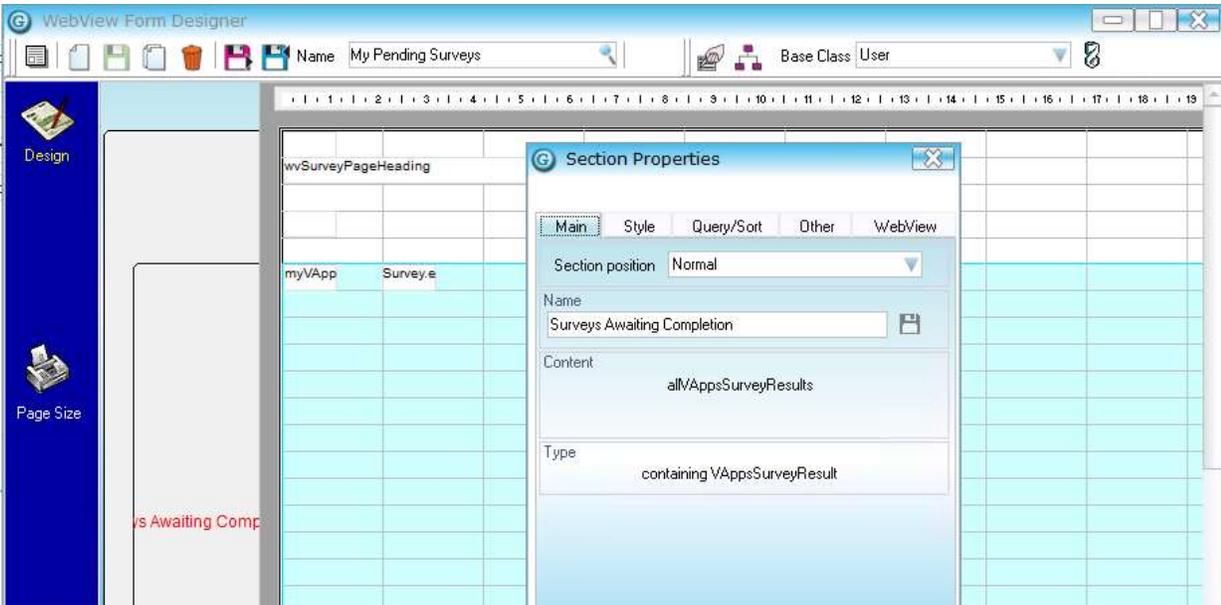


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## WEBVIEW PAGE SETUP

Webview pages need to be created as per below and linked to a Menu.

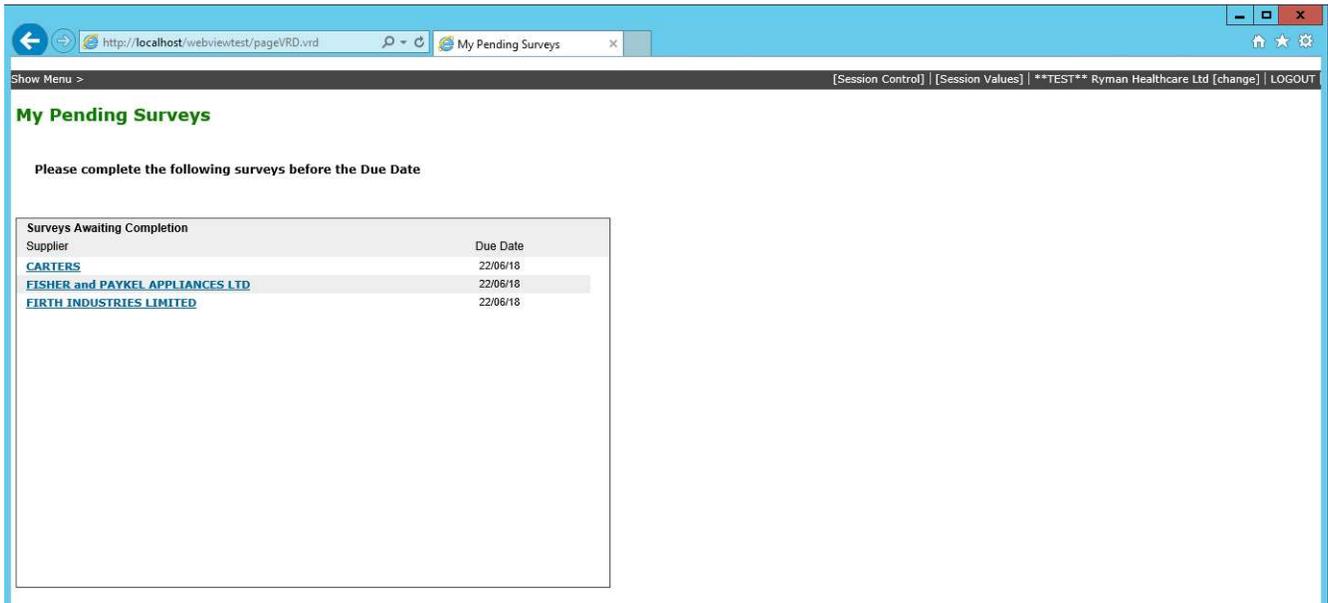




## COMPLETING THE SURVEY QUESTIONS

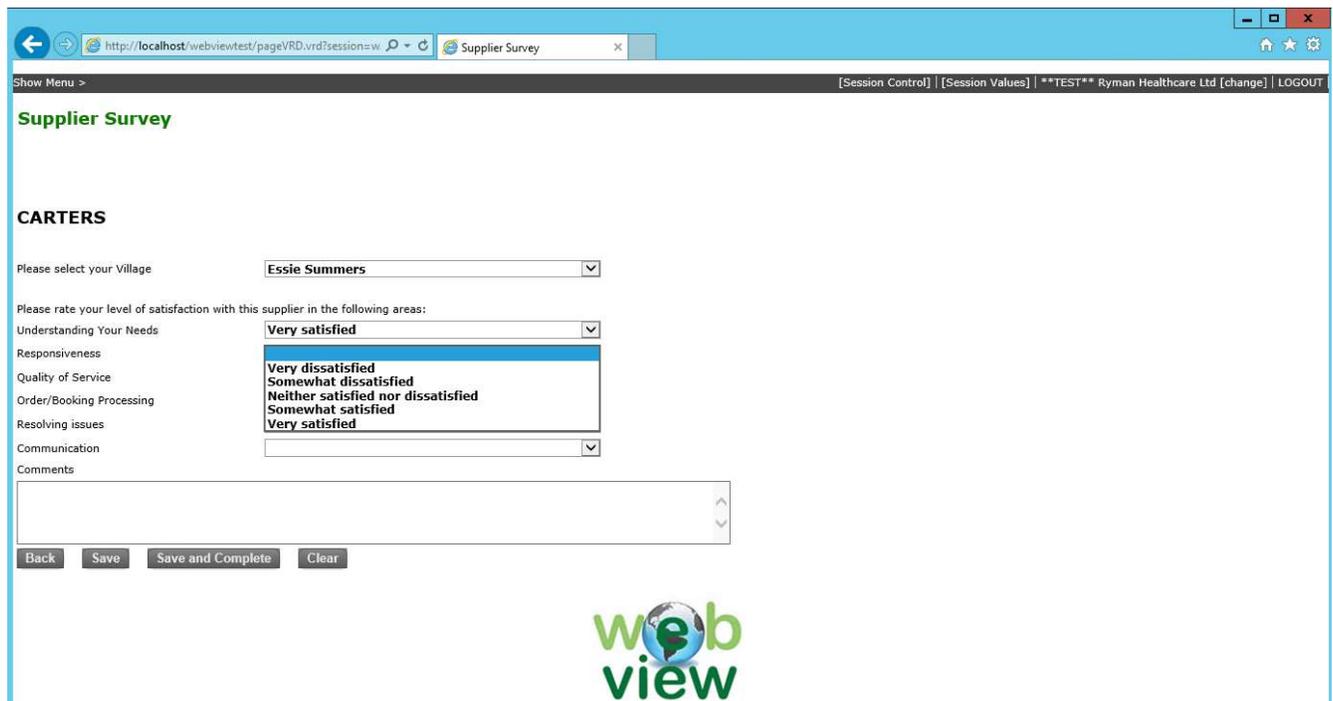
Users that are required to complete these surveys must have a Webview login in order to access them.

Webview pages are customized to suit individual sites, so your pages will not necessarily be formatted as per the following screenshots.



The screenshot shows a web browser window with the URL `http://localhost/webviewtest/pageVRD.vrd`. The page title is "My Pending Surveys". At the top right, there are links for "[Session Control]", "[Session Values]", "\*\*TEST\*\* Ryman Healthcare Ltd [change]", and "LOGOUT". The main heading is "My Pending Surveys" in green. Below it, a message says "Please complete the following surveys before the Due Date". A table titled "Surveys Awaiting Completion" lists three suppliers with their due dates.

Supplier	Due Date
<a href="#">CARTERS</a>	22/06/18
<a href="#">FISHER and PAYKEL APPLIANCES LTD</a>	22/06/18
<a href="#">FIRTH INDUSTRIES LIMITED</a>	22/06/18

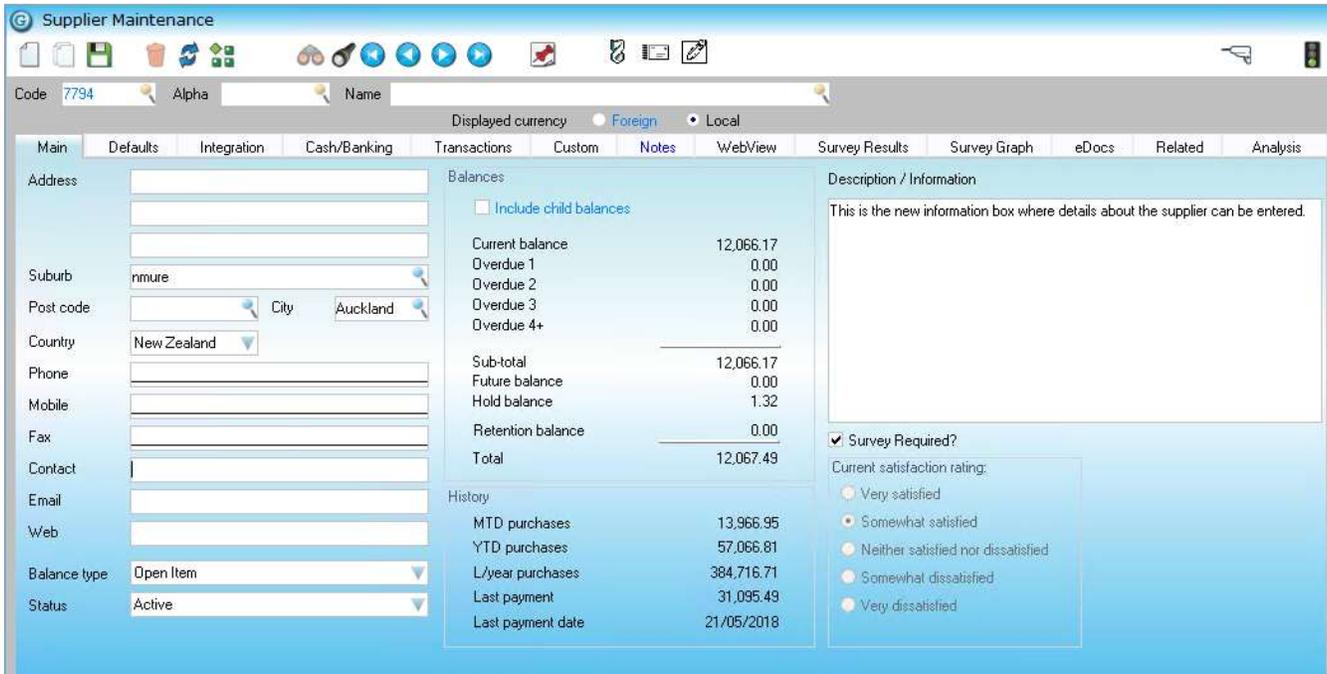


The screenshot shows a web browser window with the URL `http://localhost/webviewtest/pageVRD.vrd?session=w`. The page title is "Supplier Survey". At the top right, there are links for "[Session Control]", "[Session Values]", "\*\*TEST\*\* Ryman Healthcare Ltd [change]", and "LOGOUT". The main heading is "Supplier Survey" in green. Below it, the supplier name "CARTERS" is displayed. The form includes a dropdown for "Please select your Village" with "Essie Summers" selected. A message says "Please rate your level of satisfaction with this supplier in the following areas:". There are five dropdown menus for "Understanding Your Needs", "Responsiveness", "Quality of Service", "Order/Booking Processing", and "Resolving issues". The "Quality of Service" dropdown is open, showing options: "Very dissatisfied", "Somewhat dissatisfied", "Neither satisfied nor dissatisfied", "Somewhat satisfied", and "Very satisfied". There is a "Comments" text area and buttons for "Back", "Save", "Save and Complete", and "Clear". The "web view" logo is at the bottom right.

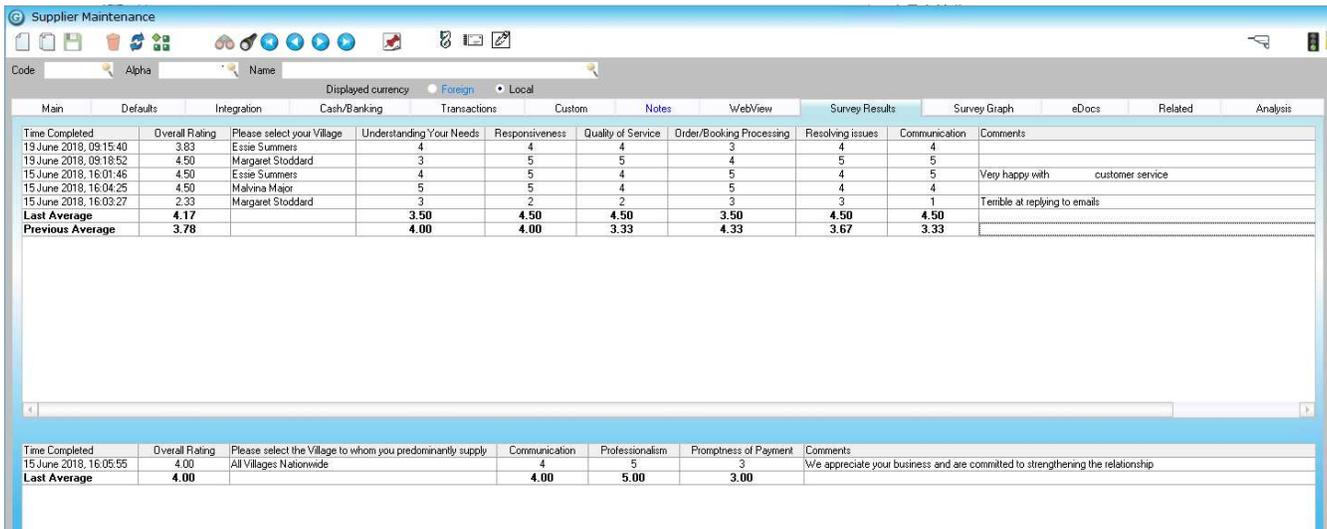
Once all the questions have been answered, the user clicks 'Save and Complete' to submit the survey. Alternatively they can partially complete it by using the 'Save' button, and then come back later to complete it

## VIEWING THE SURVEY RESULTS

When the 'Survey Required' box is ticked in Supplier Maintenance, this makes Current Satisfaction Rating visible on the Main tab. It also enables the Survey Results and Survey Graph tabs.



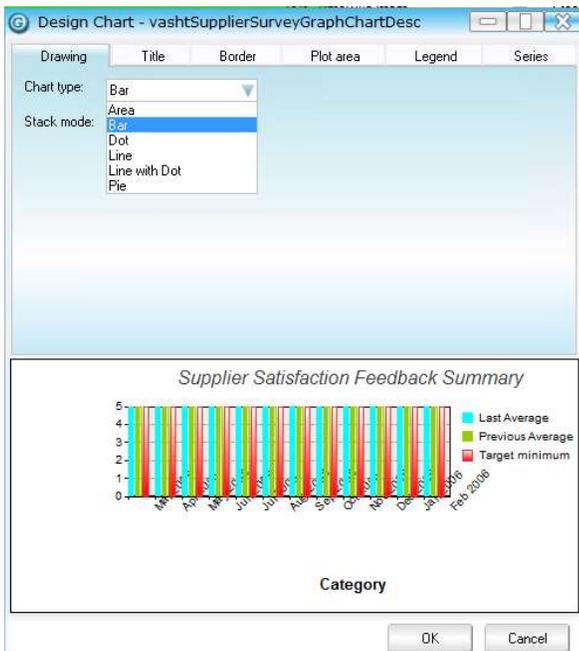
All the results can be seen within the graph on the Survey Results tab.



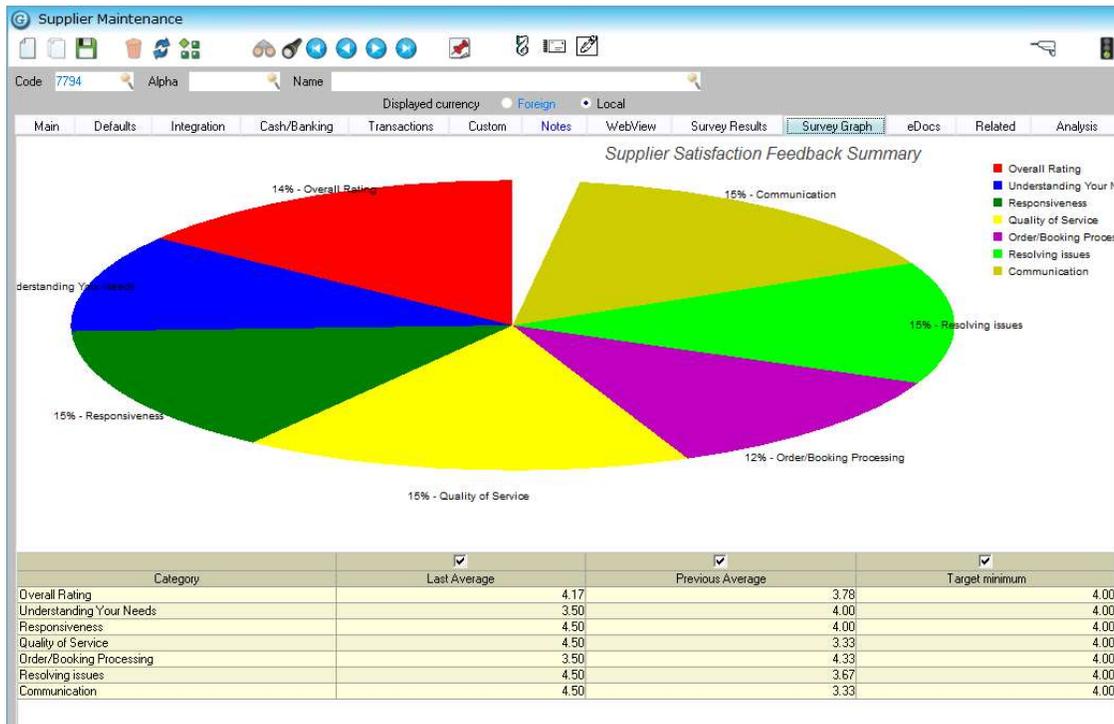
On the Survey Graph tab the results from the last two batches of surveys are graphically presented.



The default view is a Bar Graph, but it is possible to change the view to various other types of graph...



For example a Pie Graph if desired...

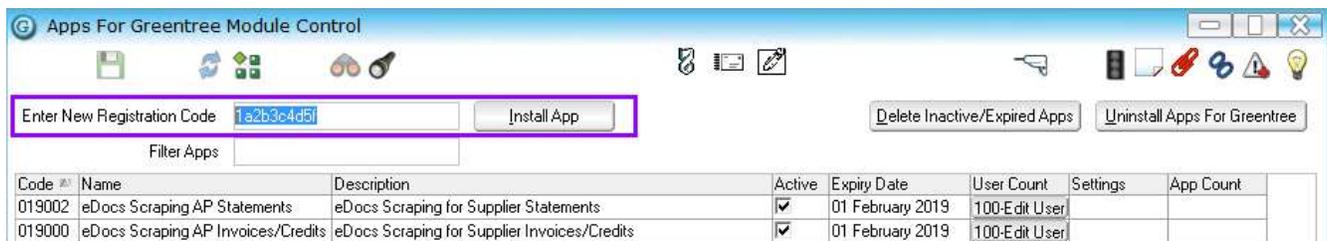


## IMPLEMENTATION GUIDE

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 Code supplied and click Install App



4. Select/Highlight the **Supplier Performance App**.



5. Click on the **Edit Users** button and select the users who will be configured to use this App for which companies.



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.