

VERSION 3.0
SEPTEMBER 14, 2021

Apps for Greentree

EMAIL COPY INVOICES

APP NUMBER: 010010

Powered by:

MYOB Greentree

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FEATURES

1. Send Multiple Copy Invoices from Customer Maintenance

Do your customers often ask for a copy of all their outstanding invoices? We bet they do, and it probably adds several hours work to your month end!

This App adds a new **Email/Print Invoices** button to the Customer Maintenance and Enquiry screens. When clicked a new **Invoice Copy Email/Print** window appears allowing invoices to be selected for emailing or printing.

Options

1. Display a list of just the outstanding invoices and credit notes or all invoices and credit notes for a customer
2. Select all or choose individual invoices
3. Combine invoices into a single PDF email attachment or attach a separate PDF per invoice
4. Configure a Default Note (email message body) and Signature to appear on the email
NB: these fields are TEXT only
5. Define the naming convention used for the attached PDF file

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

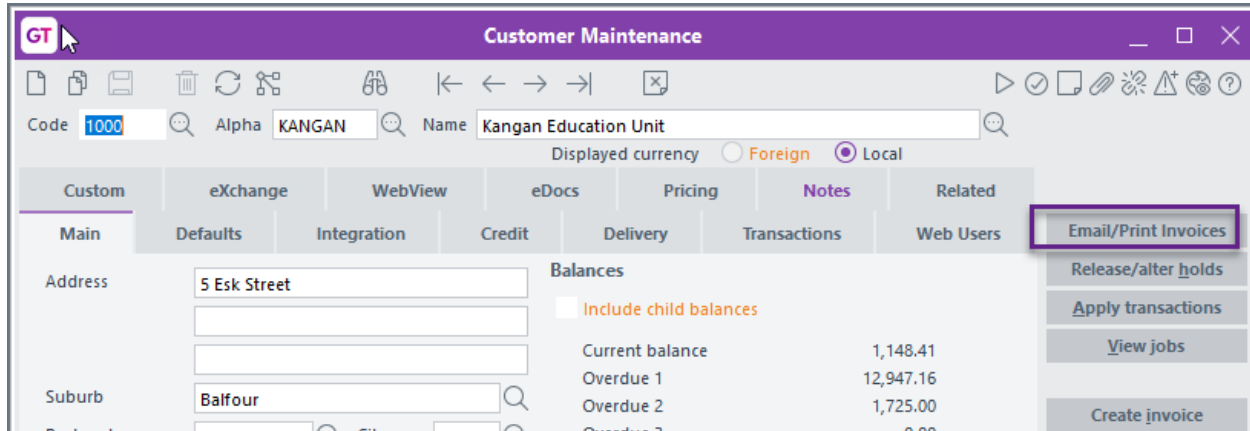
Greentree Modules: Accounts Receivable

Associated Apps: None

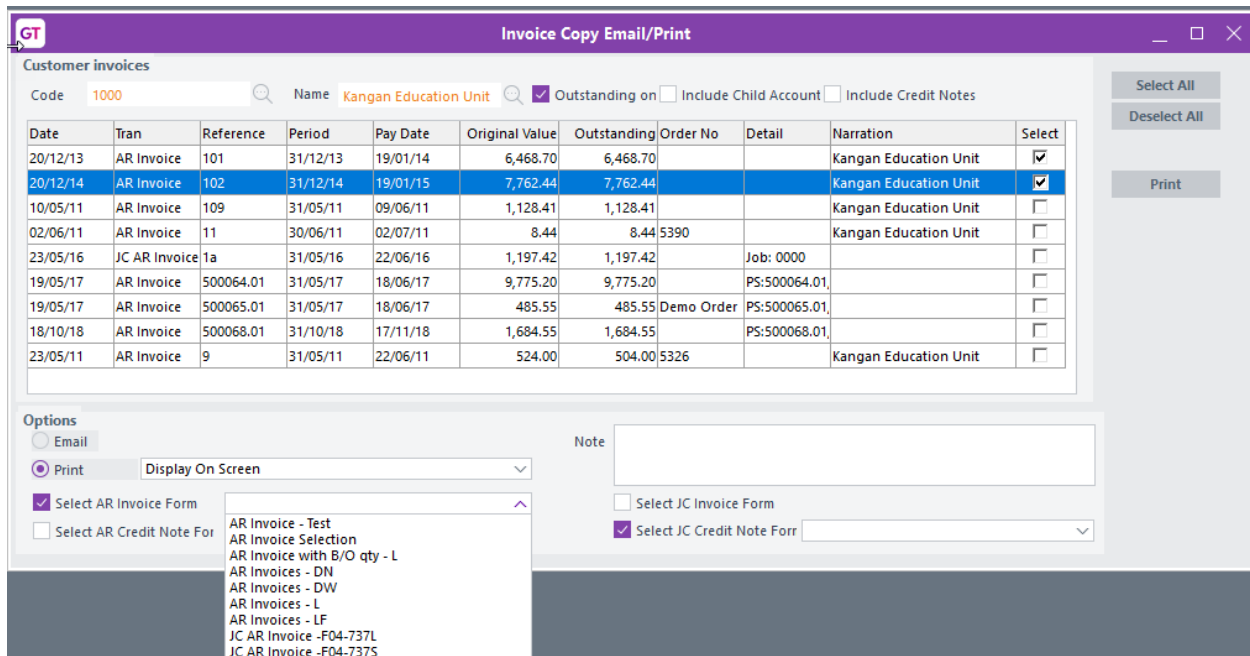
USER INSTRUCTIONS

EMAIL/PRINT INVOICES

1. Open the Accounts Receivable Customer Maintenance or Customer Enquiry screen
2. Select the Customer for whom you want to email or print invoices
3. Click on the **Email/Print Invoices** button



A new screen appears:



4. Select the invoices you want to email or print using the following controls:

- Outstanding only** Tick Outstanding only to restrict the list of Invoices to those that have an outstanding value. Un-tick to show all Invoices for a customer whether they have been paid
- Include Child Account** Tick this to include invoices on a child account within the list displayed
- Include Credit Notes** Tick this to include credit notes in the displayed list for selection
- Select Column** Tick the box in the Select Column beside each record you want to email or print
- Select All button** Selects all records, placing a tick in the Select column beside each invoice
- Deselect All** Button Un-ticks all records

Date	Tran	Reference	Period	Pay Date	Original Value	Outstanding	Order No	Narration	Select
26/4/2011	AR Invoice	10	30/4/2011	26/5/2011	2,832.91	1,632.91	4654	Kangan Education Unit	<input checked="" type="checkbox"/>
20/12/2013	AR Invoice	101	31/12/2013	19/1/2014	6,468.70	6,468.70		Kangan Education Unit	<input checked="" type="checkbox"/>
20/12/2014	AR Invoice	102	31/12/2014	19/1/2015	7,762.44	7,762.44		Kangan Education Unit	<input checked="" type="checkbox"/>
10/5/2011	AR Invoice	109	31/5/2011	9/6/2011	1,128.41	1,128.41		Kangan Education Unit	<input type="checkbox"/>
2/6/2011	AR Invoice	11	30/6/2011	2/7/2011	8.44	8.44	5390	Kangan Education Unit	<input type="checkbox"/>

5. Choose the output method Options:

- Email** The invoices will be emailed
- Combine Invoices** Tick the box to combine invoices in a single PDF email attachment. Un-tick to attach a PDF per invoice
- Note** Enter the body text for the email that that will accompany the invoices. This field is not used when invoices are printed
- Print** The invoices will be printed
- Printer drop-down** Select the printer to print to from the drop-down menu – the drop down is only displayed if you have ticked Print

6. By default the invoices and credit notes sent will use the default format from AR module control, or the format saved against the transaction if it is a JC Invoice or credit note. If you want to use a different format for this particular customer, you can click the Select box for the correct format. A drop down will then be displayed allowing you to pick a specific format to use.

7. Click on the **Email / Print** button at the right of the screen to complete the process Note: The wording on the button changes depending on the option chosen at step 5

GT Email entry form

To: email@kangan.co.nz

Cc:

Bcc:

Subject: ***** e-Computers - NZ. Customer:Kangan Education Unit Copy Invoice/s

Hi Jane,

Please find attached the copyies of invocias as requested.

Regards

File Name	File Path	File Size
101_Copy		68.1K
102_Copy		67.2K

Add Attachment Remove Attachment Send Email

IMPLEMENTATION GUIDE

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

APP INSTALLATION

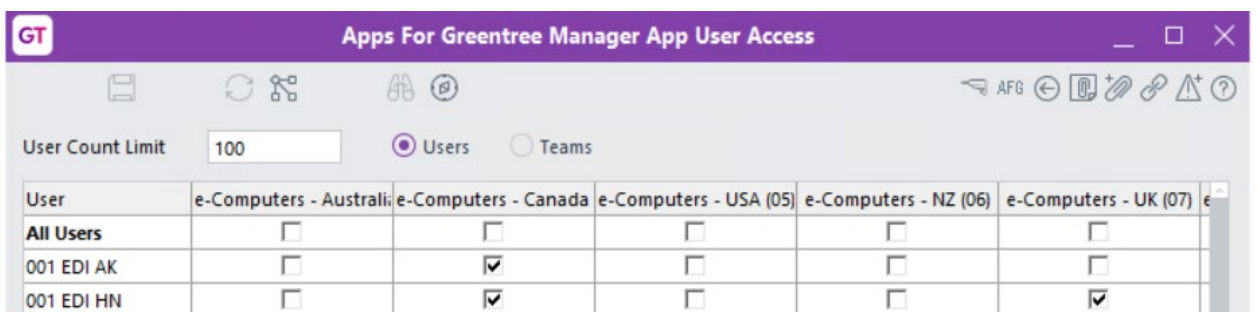
4. Log into Greentree as the **Super** user
5. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** |
6. Either enter the New Registration Codes supplied and click **Install App** or click the **Check for Purchased Apps** button to display a list of apps recently purchased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



7. Select/Highlight the **Email Copy Invoices** App.



8. Click on the **Edit Users** button and select the users who will be configured to use Email Copy Invoices, for which companies.



9. Once you have selected the users, **Save** the settings, and **Close** the window.
10. **Save** and **Close** the Module Control form.

APP CONFIGURATION

From Greentree version 3D@3 (update pack Apps4GT3D@3-10) it is possible to configure a default note and a default signature to appear on all emails sent using the App.

1. Log in to Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Locate the Email Copy InvoicesApp in the list and click on the Change button beside it

The screenshot shows the 'Apps For Greentree Module Control' window. At the top, there are buttons for 'Install App', 'Check for Purchased Apps', 'Delete Inactive/Expired Apps', and 'Uninstall Apps For Greentree'. Below these is a table of applications. The application 'Email Copy Invoices' (Code: 010010) is highlighted, and its 'Change' button is circled in red. A secondary window titled 'Email Copy Invoices Module Control' is open, showing configuration options:

- Default Combine Invoices
- Default "Print Copy Invoices?" on reprint
- Default Notes:** Copies of Invoices attached as requested
- Signature:** Kind Regards,
Accounts
- Attachment Filename:** Invoice (Reference) {Reference}_copy = 123456_copy.pdf

At the bottom of the configuration window, it says 'Editing an existing Email Copy Invoices Control'.

4. Complete the fields as needed.
5. Click on the Greentree Save Icon to Save and Close the window

Default Combine Invoices

To set as a default that invoices are combined into a single PDF before being emailed

Default "Print Copy Invoices" on reprint

To set as a default that Copy Invoice is printed on the invoices when sent

Default Notes

Enter the default not you require. NB: this is a Text only field and cannot contain images or formatting

Signature

Enter the default signature you require. NB: this is a Text only field and cannot contain images or formatting. It will be overwritten by a personal signature if one exists for the sending user in their User preferences as per the Other Greentree Configuration section.

Attachment Filename

If you would like the PDF attachment to have a specific naming convention, you can specify it here. The parameter {Reference} will output the Invoice number.

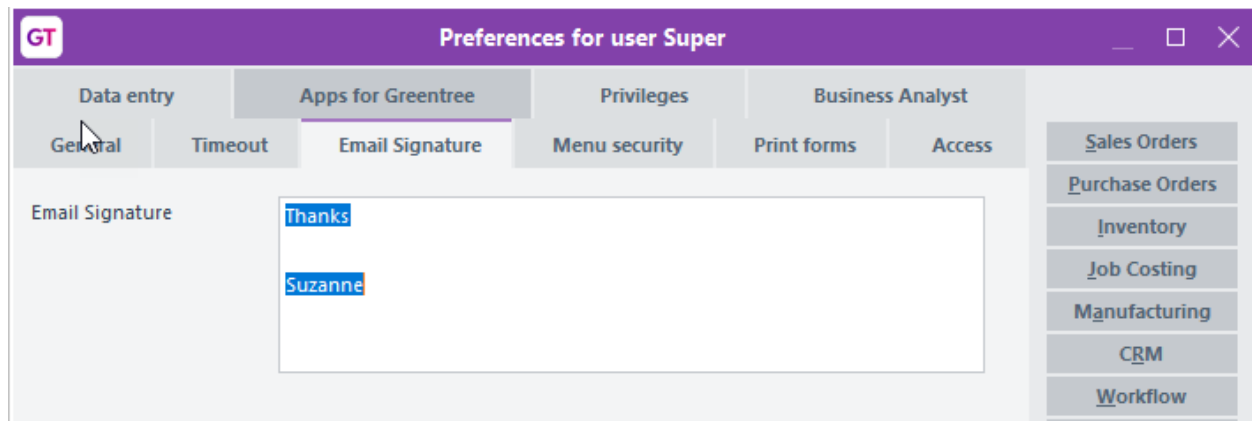
OTHER GREENTREE CONFIGURATION

USER PREFERENCES

| [File](#) | [Preferences](#) | to set up your own or

| [System](#) | [System Setup](#) | [User Maintenance](#) | to set up other users.

Each user can set up a personal email signature which over-rides the default signature set up as part of the App Configuration above.



1. Log in to Greentree as the user
2. Select the menu item | [File](#) | [Preferences](#) | or | [System](#) | [System Setup](#) | [User Maintenance](#) |
3. Click on the [Email Signature](#) Tab
4. Enter the Signature details
5. Click on the Greentree [Save](#) Icon to Save and Close the window