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

бт			Customer Ma	aintenance			_ 🗆 X
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Code 1000	C Alpha KANG	5AN 🔍 Nam				Q	
			Display	yed currency) Foreign 💿 Lo	ocal	
Custom	eXchange	WebView	eDocs	Pricing	Notes	Related	
Main	Defaults	Integration	Credit	Delivery	Transactions	Web Users	Email/Print Invoices
Address	5 Esk Street		Balanc	es			Release/alter <u>h</u> olds
	5 Esk Street		In	lude child balan	ces		Apply transactions
			Cu	rrent balance	1	,148.41	<u>V</u> iew jobs
			Ov	erdue 1	12	2,947.16	
Suburb	Balfour	-		erdue 2	1	,725.00	Create invoice
Doct code	0754	City I	0	ardua 3		0.00	-

A new screen appears:

ST					Invoice	Copy Email/	Print				_ □
Customer i	nvoices										
Code 1	1000	Q	Name Ka	ngan Educatio	n Unit 🔍 🔽 🕻)utstanding on	Include C	hild Account	Include Credit Notes		Select All
Date	Tran	Reference	Period	Pay Date	Original Value	Outstanding	Order No	Detail	Narration	Select	Deselect All
20/12/13	AR Invoice	101	31/12/13	19/01/14	6,468.70	6,468.70			Kangan Education Unit	V	
20/12/14	AR Invoice	102	31/12/14	19/01/15	7,762.44	7,762.44			Kangan Education Unit		Print
10/05/11	AR Invoice	109	31/05/11	09/06/11	1,128.41	1,128.41			Kangan Education Unit		
02/06/11	AR Invoice	11	30/06/11	02/07/11	8.44	8.44	5390		Kangan Education Unit		
23/05/16	JC AR Invoic	e 1a	31/05/16	22/06/16	1,197.42	1,197.42		Job: 0000			
19/05/17	AR Invoice	500064.01	31/05/17	18/06/17	9,775.20	9,775.20		PS:500064.01			
19/05/17	AR Invoice	500065.01	31/05/17	18/06/17	485.55	485.55	Demo Order	PS:500065.01			
18/10/18	AR Invoice	500068.01	31/10/18	17/11/18	1,684.55	1,684.55		PS:500068.01			
23/05/11	AR Invoice	9	31/05/11	22/06/11	524.00	504.00	5326		Kangan Education Unit		
eptions Email Print	Display	On Screen			~	Note					
	AR Invoice Forr AR Credit Note	For AR Invo	ice - Test ice Selection ice with B/O		^		ect JC Invoice ect JC Credit I			~	
		AR Invo AR Invo AR Invo AR Invo JC AR I	ices - DN ices - DW	37L							

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	V
20/12/2013	AR Invoice	101	31/12/2013	19/1/2014	6,468.70	6,468.70		Kangan Education Unit	~
20/12/2014	AR Invoice	102	31/12/2014	19/1/2015	7,762.44	7,762.44		Kangan Education Unit	~
10/5/2011	AR Invoice	109	31/5/2011	9/6/2011	1,128.41	1,128.41		Kangan Education Unit	
2/6/2011	AR Invoice	11	30/6/2011	2/7/2011	8.44	8.44	5390	Kangan Education Unit	

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		o x
То	email@kangan.co.nz		
Cc			
Bcc			
Subject	***** e-Computers - NZ. Customer:Kangan Education U	nit Copy Invoice/s	
Hi Jane,			^
Please fin	nd attached the copyies of invocies as requested.		
Regards			
1			
File News	File Path File Size		~
101_Copy			
101_Copy			
102_COP)	07.2K		
<u>A</u> dd	Attachment <u>R</u> emove Attachment	<u>S</u> end Ema	iil

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.

GT		Apps For Gre	entree	Module Control				×
	8 0 %	: # @						S AFG 🖸 🗊 🖉 🖉 🕐
Enter N	ew Registration Code	Install Ap	p	Check for Purchase	d Apps	Delete Inactive	Expired Apps	Uninstall Apps For Greentree
c	Filter Apps	Yew Add	IS .		_			
Code	Name	Description	Active	Expiry Date	User Coun	t Settings	App Count	-
000000	Apps For Greentree Form	App Usage information on Forms	₹	31 December 2099	0-Edit Use	ers		
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	1	23 June 2020	100-Edit U	lse		
010002	IN Reorder Workbench	Inventory Reorder Workbench	~	25 June 2021	100-Edit U	lse Change		
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	•	30 June 2040	100-Edit U	lse Change		
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales His	v	31 December 2099	100-Edit U	lse		
010005	AR/IN Pricing Tab	Pricing Tab in Customer and Inventory Maintenand	1	28 May 2021	0-Edit Use	ers		
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	2	31 December 2099	100-Edit U	lse Change		1
	l	la contra c	-	la.a				1 1

7. Select/Highlight the Email Copy Invoices App.

GT			Apps For Greentree M	odule Control				_ C	x c
	E 0 %	: # @					∽¶ AFG ⊕	000	₫ @
Enter N	ew Registration Code		Install App		Delete Inac	tive/Expired Apps	<u>U</u> ninstall	Apps For Gree	ntree
	Filter Apps		View Audits						
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count	
000000	Apps For Greentree Form	App Usage information on Fo	ems	•	31 December 2099	0.Edit Urarr			
010001	AR Sales Orders Tab	Tab in Customer maintenance	e to display Sales Orders	2	31 December 2099	100-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workbenc	h	2	31 December 2099	TOO EUR OSEIS	Change		

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

T Apps For Greentree Manager App User Access _ □								
	C 🐕 🚯 🞯 🖘 AFG 🤅							
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)			
All Users								
001 EDI AK		V						
001 EDI HN		V			V			

- 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

GT			Apps For Gree	entree	Module Control					_ □ >
		: # Ø						-	≂ AFG € [
Enter Ne	ew Registration Code		Install Ap	p	Check for Purchased	d Apps	Delete Inactive/	Expired Apps	Uninstall /	Apps For Greentr
	Filter Apps		<u>V</u> iew Audi	ts		_				
Code	Name	Description		Active	Expiry Date	User Cour	nt Settings	App Count		
000000	Apps For Greentree Form	App Usage information of	n Forms	•	31 December 2099	0-Edit Us				
010001	AR Sales Orders Tab	Tab in Customer mainter	nance to display Sales Ord		25 June 2022	0-Edit Us	ers			
010002	IN Reorder Workbench	Inventory Reorder Work	bench	•	24 September 2021	100-Edit (Use Change			
010003	IN Min/Max Workbench	Inventory Min/Max Work	kbench	~	30 June 2040	100-Edit (Use Change			
010004	AR Sales History Tab	Tab in Customer mainter	nance to display Sales His		31 December 2099	100-Edit (Use			
10005	AR/IN Pricing Tab	Pricing Tab in Customer	and Inventory Maintenand		28 June 2025	0-Edit Us	ers			
10006	Transaction UDF	Tab in Transaction Entry	for Custom UDF Fields	•	31 December 2099	100-Edit (Use Change			
10007	Job Cost Shift Managem	Functionality that allows	the definition of a shift time		31 December 2099	100-Edit (Use Change			
10008	Utility System Scripts	A collection of useful scr	ipts for importing and expo		31 December 2099	100-Edit (Use Change			
10009	Copy Clever Table Settin	A Utility that allows copy	ing of clever table settings		31 December 2099	100-Edit (Use			
010010	Email Copy Invoices	Functionality to email cu:	stomer invoice copies		31 December 2099	100-Edit (Use Change			
010011	Snap Shot Workbench	Create Snap Shots of d	CT				and the second s			
10012	IN Pricing Workbench	Inventory pricing workb	GT	Emai	I Copy Invoices N	iodule C	ontrol	—		
010013	Copy GL Journal	Allows copying of a GL		G	K # @)	→ AF	G 🕞 🗊 🤣	810	
10014	WebView CRM Mainten	Webview CRM Mainter	_	_						
010015	System Script Security	Set Security on System	Default Combine l	nvoices						
10016	Default Customer Mainte	Default Customer Maint	Default "Print Copy	v Only?	on reprint					
10017	Copy User Settings	A Utility that allows copy								
010018	JC Job Transaction Entry	Functionality that allows	Default Notes	Copies	of Invoices attached	l as reque	sted			
			Signature	Kind R	egards,					
				Accour	nts					
			Attachment Filename	Invoice	{Reference}		{Reference}_co	py = 123456_co	py.pdf	
			Editing an existing E							

- 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.

GT		Preferen	_ 🗆 X			
Data entry		Apps for Greentree	Privileges	Business Analyst		
Geivital	Timeout	Email Signature	Menu security	Print forms	Access	Sales Orders
						Purchase Orders
Email Signature		Thanks				Inventory
		Suzanne				Job Costing
						M <u>a</u> nufacturing
						C <u>R</u> M
						Workflow

- 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