VERSION 1.0 AUGUST 22, 2019

Apps for Greentree

WEBVIEW CRM MAINTENANCE

APP NUMBER: 010014

Powered by:

MYOB Greentree

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FEATURES

1. WebView CRM Maintenance

This App will allow access to WebView CRM Maintenance pages for CRM related data.

These pages can be added as drilldowns or you can add them to the menu directly

If they are added as drilldowns from other pages, then you will get related fields auto populated, for instance adding a communication from an organisation.

Prompted communications allow for a click through to the CRM Prompted Communications form with is a pre-set layout, with sequenced questions provided by the prompted communication.

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: CRM, WebView.

Associated Apps: None

USER INSTRUCTIONS

WEBVIEW CRM MAINTENANCE

The WebView pages added by this app are CRM related.

These need to be configured in Greentree prior to use. The WebView screen below has been enabled by the web page configuration described in the following sections. Without the app the page types required eg contactEntry, will not be available.

- Communications
- Organisation
- Contact
- Quote
- Contact Prompts

Login to the web and navigate to the page you added the drill down links to.

Greentree Web	/iew				
Show Menu >					
CRM Org Form	with Comms : 1000 - Kangan	Education Unit			
Code	1000			Enter	Communication
Name	Kangan Education Unit				
Customer :	Kangan Education Unit			Add n	ew Contact
Leads					
Summary		Opened	Status	Assigned To	
Interested in the conference	on new products	03 March 2008, 10:46:04	Closed - Won	SUPER	
Lisa interested in new produ	cts	03 January 2008, 15:10:28	Beginning Process	SUPER	
Upgrading		02 June 2011, 12:18:45	Beginning Process	SUPER	

The buttons are available for clicking through to the new pages.

E 🔿 🥭 http://gtv	vebtest.verde.co.nz/pageVRD.vrd?session	=d48o0qdvj27aflrqptuwt0rzhfeatnhf& 🔎 🗝 🖒	😨 Verde Group SharePoint - Home	Big Ticket Greentree4 architect	© CRM Contact Entry ×
Greentree Web	View				
Show Menu >					[Session Control] [Session Va
CRM Contact E	ntry				
Add/Edit Contact		1			
Surname Full Name]			
Organisation	Kangan Education Unit				
Position	Rangan Education onic				
From Organisation		la l		From Organisation	
Business Street Address		1		Business Postal Address	50 Glengarry Ave
]			
Suburb	Burwood			Suburb	Burwood
Post Code	3125			Post Code	3125
City	VIC			City	VIC
Country	Australia 🗸			Country	Australia 🗸
Personal Street Address]		Personal Postal Address	
]			
Suburb				Suburb	
Post Code				Post Code	
City				City	
Country	Australia 🗸			Country	Australia 🗸
Phone					
A/H Phone					
Mobile					
Email					
Relationship	Other 🗸				
Status	Active				_
Primary Contact				Debt Collection Contact	
Reports To	✓			Data of Diata	
Gender Exclude from Mailing	V			Date of Birth	
List					
Salesperson	Steve Sampson 🗸			Assigned User	SUPER V
Back Save					
<					

Fill out the fields as appropriate and click Save to add a contact.

Greentree WebView

Show Menu >		
CRM Prompted	Communication	
Communication Ent	гу	
Number		
Subject *		
Organisation	Kangan Education Unit 1000 KANGAN	
	~	
Note		
	I	
Contact	Lisa Stanley	
Date	27/10/2015	
Primary Product	V	
How satisfied are you with the results? *		
What improvements woudl you like to make for next month? *		
What date did you review this? *		
Back Save	Clear Copy	

Complete fields for the communication and click Save. The responses to the prompted questions will be stored against the specified Trees and UDF's and will be overwritten each time the page is saved.

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

🕝 App	s For Greentree Modul	le Control				
	🖹 🛛 🎜 🔠	ão 🛷		- A	ops 🚦 🗔 🎸	9 S 🕼 🍕
Enter Ne	ew Registration Code		Install App	Delete Inactive/Expired Apps	Uninstall App	os For Greentree
Code	Name		D	escription	Active	Expiry Date
000000	Apps For Greentree Form		A	op Usage information on Forms	•	31 December 2
010001	AR Sales Orders Tab		Te	ab in Customer maintenance to display Sa	ales Ord 🔽	03 December 2
010002	IN Reorder Workbench		In	ventory Reorder Workbench		31 December 2
010003	IN Min/Max Workbench		In	ventory Min/Max Workbench		31 December 2
10004	AR Sales History Tab		T	ab in Customer maintenance to display Sa	ales Hisl 🔽	31 December 2
	AB Pricing Tab			ab in Customer maintenance to display Pri	icina 🔽	31 December 2

- 4. Select/Highlight the WebView CRM Maintenance App.
- 5. Click on the Edit Users button and select the users who will be configured to use WebView CRM Maintenance, for which companies.

G Apps For Gr	eentree Manager Ap	p User Access			
	<i>😂</i> 🔠	ño 🝼		-Apps 🚦 🥏 🕻	6 6 🕼 💡
User Count Limit	100				
User	e-Computers - Australia ((e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers · 🔺
All Users					
001 EDI AK					
001 EDI HN					
ADMIN					
Amanda					
andrew					
Angela					
Angela Allen					
April Aston					
ashlin					

- 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.

OTHER GREENTREE CONFIGURATION

Complete the following set-up in Greentree before configuring the App.

WEBVIEW PAGE MAINTENANCE

Pages are hard-coded or semi coded.

| System | WebView | Page Maintenance |

CONTACT ENTRY

WebView Page Maintenance		
	< ✓ < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < < <	
Code contactEntry	۹	
Name CRM Contact Entry	a.	
Page Type contactEntry	V	
	Main	
Page Options		
Туре	Value	
Hide Code		
Hide Relationship		
Hide Business Physical Address		
Hide Business Postal Address		
Hide Personal Physical Address		
Hide Personal Postal Address		
Hide Address Line 3		
Hide Primary Flag		
Hide Debt Collection Flag		
Hide Reports To		
Hide A/H Phone Number		
Hide Gender and DOB		1
Hide Exclude from Mailing List		
Hide Position		
Hide Occupation		1
Display Full Name text		1

- 1. Select the Page Type, then make the Code the same as the Page Type and enter a Name suggestion would be to use a name that is similar but readable.
- 2. Complete the lower portion of the screen to suit your needs based on what you wish to hide or display on the page in Webview.

ORGANISATION ENTRY

Ġ WebView	Page Maintenance		
	₩⊖₩	< \$ € € €	💾 💾
Code	orgEntry	•	
Name	CRM Organisation Entry	•	
Page Type	orgEntry	•	
		Main	
Page Options	R		
Туре		Value	
Hide Physic	al Address		
Hide Postal	Address		
Hide Addres	ss Line 3		
Hide Parent	: Organisation		
Hide Reselle	_		
Hide Territor	ſŲ		
Hide Industr	-		
Hide Mobile	-		
Hide Fax			
		-	.d

- 1. Select the Page Type, then make the Code the same as the Page Type and enter a Name suggestion would be to use a name that is similar but readable.
- 2. Complete the lower portion of the screen to suit your needs based on what you wish to hide or display on the page in Webview.

COMMUNICATION ENTRY

G WebView	v Page Maintenance		
		୍ 🖋 🛛 💽 🕒	
Code	communication	•	
Name	CRM Communication	٩	
Page Type	onlineCommunication	T	
		Main	Navig
Page Options	S		
Туре		Value	
Communica	ation Type		
Default Cor	mmunication Type		
Display Cor	mmunication Type		
Communica	ation Method		
Default Cor	mmunication Method		
Display Cor	mmunication Method		
Communica			
Default Cor	mmunication Status		
Display Cor	mmunication Status		
Date			
Display Dat	te		
	Change Organisation		
	Change Contact		
Allow Follow			
Follow-up D		P	
Follow-up S			
	low-up Status		
	low-up Status		
Page Prom		<u> </u>	
	pt Mandatory		
	on Follow-up		
Allow Edit	orr olorr up		
Hide Call N	umber		
		•• ·	
			TI 100521117 D
Adding a new	w WebView Page		There are 106 WebView Pages

- 1. For communications it is possible to have two types, so the Code does not have to be the same as the Page Type.
- 2. The example below shows a standard communication where just one text box for data entry is displayed. The second option of Prompted Communications is detailed in the next section.
- 3. Complete the lower portion of the screen to suit your needs based on what you wish to hide or display on the page in Webview.

}) Web∨iew Page Ma	intenance				
		2 🖋 🕑)		B B
Code communic	ation	•			
Name CRM Com	munication	۹.			
Page Type onlineCom	munication	T			
	Ma	ain			
Page Options					
Туре	V	alue		A.	
Communication Type	P	age Default			
Default Communication	Type G	eneral			
Display Communication	Туре 🗌				
Communication Method	P	age Derault			
Default Communication	Method W	/EB			
Display Communication	Method				
Communication Status	P	age Default			
Default Communication	Status 0	PEN			
Display Communication	Status 🗌				
Date	T	oday			
Display Date					
Allow Add/Change Orga	anisation				
Allow Add/Change Con	act 🗸				
Allow Follow-up					
Follow-up Default					
Follow-up Status					
Default Follow-up Status	3				
Display Follow-up Status	:				
Page Prompt					
Page Prompt Mandatory					
Save Note on Follow-up					
Allow Edit	Г				
Hide Call Number	Г	1			

Adding a new WebView Page

There are 106 WebView Pages

4. For some of the options you have the choice of Module, Page or Select

Module Default	This will refer back to the CRM module control and use the default specified there.
Page Default	This lets you select the type you want on the following line
Select	It will display a prompt on the page and the user has to pick the type when they are creating the communication.

PROMPTED COMMUNICATIONS

For Prompted communications you have a new menu option – you may have to log out and back in after installing the App.

| System | WebView | CRM Prompt Maintenance |

Prompts allow for recording responses within a communication to specific questions. The questions and the relevant answers can be setup to be asked in different circumstances.

G CRM	Prompt Maintenance		×+− ⑦ ∆ ∃ V
Code Heading	MTHLY Name Monthly Report Response	Class	
Prompts Sequen 10	rce Prompt How satisfied are you with the results?	Active Type Settings Property Tree Free Text Selection Date	/UDF

- 1. Give the prompt a Code and Name that explains its purpose.
- 2. Add a Heading to appear at the top of the page e.g. instructions.
- 3. Add the questions to be asked in the sequence you wish them to be asked in. The even numbers will display on the left, the odd numbers will display on the right, allowing for a two column page. For Type the options are:

Free text	A string you can type free form text into
Selection	Activates a button to setup what the options should be – refer below
Date	Enables typing a formatted date

4. If Type is Selection, click the Settings button to enter the valid responses

GT	CRM Prompt Selection Maintenance	_ = ×
ľ	- C X: # @	🖘 afg 🕞 🗊 🧳 🖉 🕂 🕐
Sequence	Selection	
10	Very satisfied	
20	Satisfied	
30	Not satisfied	
1		

- 5. Select from Property whether the responses will be recorded in Greentree against a Tree or a UDF on the contact person.
- 6. Select the name of the Tree or UDF from the Tree/UDF column. These trees and EDF's will need to be setup prior to creating the prompts. When completing a prompt communication page, these Trees and UDF's will be overwritten each time the prompt page is saved.

GT			CRM Prompt Maint	tenance				_
00		53 64	$@ \vdash\!$				∽⊊ AFG	© ◘ ₺ ₽ ₫ 0
Code	MTHLY	Q Name	Monthly Report Response		Q			
Heading	Complete these fie	elds in full:			Class		\sim	
Prompts	s							
Sequen	ncePrompt			Active	Туре	Settings	Property	Tree/UDF
10	How satisfied are	you with the res	ults?		Selection	Settings	Tree	Satisfaction Q
20	What improvemer	nts would you lik	e to make for next month?		Free Text		UDF	
30	What date did yo	u receive this?			Date		UDF	
Editing	an existing Prompt			Prompt 4	of 5			

7. Specify the Prompt to use on the Communication Page. Example page:

, 19 F		୍ 🛠 🛛 🗨 🔊	
Code	communicationPrompt		
Name	CRM Prompted Commu	nication 🔍	
^D age Type	onlineCommunication	V	
		Main	
age Options			
Туре		Value	
Communica	tion Type	Page Default	
Default Con	nmunication Type	General	
Display Con	nmunication Type		
Communica	tion Method	Page Default	
Default Con	munication Method	WEB	
Display Con	munication Method		
Communica	tion Status		
Default Con	nmunication Status	CLOSE	
Display Con	nmunication Status		
Date		Today	
Display Dat	e		
Allow Add/(Change Organisation		
Allow Add/(Change Contact		
Allow Follov	v-up		
Follow-up D	efault		
Follow-up S	tatus		
	ow-up Status		
Dioplay Foll	on ap Clulao		
Page Promp		MTHLY	
Page Promp	ot Mandatory		
Cove Mete	en Fellennup		
Allow Edit			
Hide Call N	umber		

SETTING UP FORMS

- 1. Once you have set up your prompts, you create a WebView page that calls those prompts.
- 2. You then must have a WebView Form that you add a label/button to, to enable entry of the communication.

Form Designer	Name CF	RM Org Form wi	th Comms	٩	Base Class	CRMOrganisation 🔻	- + × G Available Fields Palette ×
		2 · I · 3 · I ·	4 - 1 - 5 - 1 -	6 • 1 • 7 • 1 • 8	11		Database Others Database Methods Calculations ChMOrganisation Calculations
Leads	summary	entryTirr	myLead	myAssig			Main Style Format Other WebVier Name CommEntry Content Enter Communication
							Type Alphanumeric
	Leads	Leads	Leads	Leads	Leads	Image: Control of the control of th	Image:

3. Drag a label onto the header, label the field and type in the text you want to display – remember to click the save button to save the field name

G Field	Properties	3		×				
Main	Style	Format	Other	WebView				
🗹 Enable	e Drilldown							
Page T	уре	other	1	T				
Page		CRM Prom	oted Comm •					
Column W	/idth (px)		0 🗌 Allow Update					

4. Click on the WebView tab then enable drill down and select your communication page

	Form Designer							= + :	🗙 Ġ Available Fields Palette 🛛 🗙
] 🖓 🖽 🗉	🕒 Name CF	RM Org Form with	n Comms	•	B, 📩	Base Class CRMOrganisatio	n 🔻 🎖	
Design			2 • 1 • 3 • 1 •	4 • 1 • 5 • 1 •	6 • 1 • 7 • 1 • 8	8 • 1 • 9 • 1 • 10 •	I <u>•11 · I</u> •12 · I · 13 · I · 14		Others Database Methods Calculations CRMDrganisation
Design		Code	code				Enter Cc		A alert A alertText
		Name Customer :	name myGTCustom	ername		_	Add nev		allAppointments allAppointmentsByStart allApprovalCodeMemberships
									G Field Properties 🗙
		summary	entryTirr	myLead	myAssig				Main Style Format Other WebView
\$									Page Type other
Page Size	Leads								rage type
									Page CRM Contact Entry
									Column Width (px) 0 Allow Update
		code	description	mySVAs	myStatu				

5. Enabling entry of a new Contact is done is the same way.

G WebView	Page Maintenance	≝ ⊦ ≌ t
chie	crmOrgFormComms	
Name	CRM Org Form with Comms	
Page Type	onlineWebForm 🔻	
	Main	
Web Form D		
Form	CRM Org Form with Comms 🔍 Init Method	Edit Delete

6. If you created your WebView form from scratch it should automatically create the WebView page for you – if it was copied, the page will need to be created manually.

Ġ WebView Mer	nu Maintenance						- + ×
	⋓⊖船	୍ 🖋 🗷		ا 🔇		D 🖓 🖳 🔁	8 🕂 🕐
Menu Name Mai	in Menu	۹. С)efault Start Pag	je Y	'our Workflow Desk	top 🔍	
	CRM Org Form with Cor CRM onlineWebForm CRM Org Form with Cor	•	6	Financia GL Publ Customer Drint Sta Job Cost Hold Sta Call Jobs Call Jobs Call Jobs Call Service	dger stion Enquiry al Reports lished Reports er Enquiry atement .iry Asset Enquiry Asset Enquiry n Enquiry	↑ ,	•
Editing an existing	WebView Menu		W	ebView Menu	1 3 of 4		

7. Add your new form/page to the menu or setup a drill from an enquiry as appropriate

G WebView	Page Maintenance							- + x
	│ ₩⊖₩ _ ○	Հ ๙ ๎ ๎ ํ ํ ํ ํ ํ ํ ํ ํ ํ ํ					2 🖓	8 🕂 🕄
Code	CRM Organisation	۹.						
Name	CRM Organisation	•						
Page Type	onlineEnquiry	•						
	Ma	ain				Navigator		
						-		
Query Details	s CRM Org (CRMOrganisation)		Mair					
,				ntain >>>	Allow Export to Excel	v		
Init Method	Add D	elete	Exp	ort Query	Table Height	0		
an est	C-1	ection Criteria				O Calumna		
	Sele	ection Uniteria				Query Columns		
Column	No Field Name	Display Name	Alignment	Format	Drill Down		Footer Caption	Filte
1	code	Code	left	<select></select>	<select;< td=""><td></td><td></td><td>Nor</td></select;<>			Nor
2	name	Name	left	<select></select>	CRM Organisation			Nor
3	myRelationship.description	Relationship	left	<select></select>	<select)< td=""><td></td><td></td><td>Nor</td></select)<>			Nor
4	myGTARCustomer.myCuston	ner Customer Payment Terms	left	<select></select>	<select;< td=""><td>None</td><td></td><td>Nor</td></select;<>	None		Nor
:		G Drill Down				- + ×		
4		🗹 Enable Drilldown						
		Page Type	onlineWe	bForm	V			
		Page	CRM Org	Form with Cor	nms 🔍			
				S	ave Cance			
Ready								

8. Drill from explorer query page.

APP CONFIGURATION

WebView CRM Maintenance Setup

- 1. Log in to Greentree as the Super user
- 2. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 3. Locate the WebView CRM Maintenance App in the list and click on the Change button beside it.

GT		CRI			_ 0	×			
C]		5	61	0	P	© D V	084	\$
Organisati	ion Selectio	n							
Organisat	ion Code C	ollecti	on WebVie	w Vie	w	allOrganisationsCode \vee			
Organisat	ion Name C	ollecti	ion WebVie	w	allOrgan	nisationsNam	1e	\sim	

These allow configuration of views to get Organisation by code and Organisation by name collections. These are used in the Communications Entry age. If left blank they will not be used. Selection can only be of a wvView that is a collection on Organisation class but there is no further validation of the legitimacy of the view.