

VERSION 1.0  
AUGUST 22, 2019

# Apps for Greentree

## WEBVIEW CRM MAINTENANCE

APP NUMBER: 010014

Powered by:

**MYOB** Greentree

**TABLE OF CONTENTS**

Features ..... 2

    Important Notes ..... 2

    Other Requirements ..... 2

User Instructions ..... 3

    WebView CRM Maintenance ..... 3

Implementation Guide ..... 6

    APP INSTALLATION ..... 6

    OTHER GREENTREE CONFIGURATION ..... 7

        Webview Page Maintenance ..... 7

        Contact Entry ..... 7

        Organisation Entry ..... 8

        Communication Entry ..... 9

        Prompted Communications ..... 10

        Setting up forms ..... 13

    APP CONFIGURATION ..... 17

        WebView CRM Maintenance Setup ..... 17

## 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 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 WebView

The screenshot shows the Greentree WebView interface. At the top, there is a blue header with "Show Menu >". Below that, a blue bar displays "CRM Org Form with Comms : 1000 - Kangan Education Unit". The main content area shows details for a customer: "Code: 1000", "Name: Kangan Education Unit", and "Customer: Kangan Education Unit". On the right side, there are two blue buttons: "Enter Communication" and "Add new Contact", both of which are circled in red. Below the customer details is a table titled "Leads" with columns for Summary, Opened, Status, and Assigned To. The table contains three rows of lead data.

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 products	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.

[Greentree WebView](#)
[Session Control] | [Session Val]

**CRM Contact Entry**

**Add/Edit Contact**

Code	<input type="text"/>		
Surname	<input type="text"/>		
Full Name	<input type="text"/>		
Organisation	<input type="text" value="Kangan Education Unit"/>		
Position	<input type="text"/>		
From Organisation	<input type="checkbox"/>	From Organisation	<input type="checkbox"/>
Business Street Address	<input type="text" value="50 Glengarry Ave"/>	Business Postal Address	<input type="text" value="50 Glengarry Ave"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
Suburb	<input type="text" value="Burwood"/>	Suburb	<input type="text" value="Burwood"/>
Post Code	<input type="text" value="3125"/>	Post Code	<input type="text" value="3125"/>
City	<input type="text" value="VIC"/>	City	<input type="text" value="VIC"/>
Country	<input type="text" value="Australia"/>	Country	<input type="text" value="Australia"/>
Personal Street Address	<input type="text"/>	Personal Postal Address	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
Suburb	<input type="text"/>	Suburb	<input type="text"/>
Post Code	<input type="text"/>	Post Code	<input type="text"/>
City	<input type="text"/>	City	<input type="text"/>
Country	<input type="text" value="Australia"/>	Country	<input type="text" value="Australia"/>
Phone	<input type="text"/>		
A/H Phone	<input type="text"/>		
Mobile	<input type="text"/>		
Email	<input type="text"/>		
Relationship	<input type="text" value="Other"/>		
Status	<input type="text" value="Active"/>		
Primary Contact	<input type="checkbox"/>	Debt Collection Contact	<input type="checkbox"/>
Reports To	<input type="text"/>	Date of Birth	<input type="text"/>
Gender	<input type="text"/>	Assigned User	<input type="text" value="SUPER"/>
Exclude from Mailing List	<input type="checkbox"/>		
Salesperson	<input type="text" value="Steve Sampson"/>		

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

CRM Prompted Communication

Communication Entry

Number	<input type="text"/>
Subject *	<input type="text"/>
Organisation	Kangan Education Unit   1000   KANGAN <input type="button" value="v"/>
Note	<div style="border: 1px solid #ccc; height: 50px; width: 100%; padding: 5px;">I</div>
Contact	Lisa Stanley <input type="button" value="v"/>
Date	27/10/2015 <input type="button" value="calendar"/>
Primary Product	<input type="text"/> <input type="button" value="v"/>
How satisfied are you with the results? *	<input type="text"/> <input type="button" value="v"/>
What improvements would you like to make for next month? *	<input type="text"/>
What date did you review this? *	<input type="text"/> <input type="button" value="calendar"/>
<input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Copy"/>	

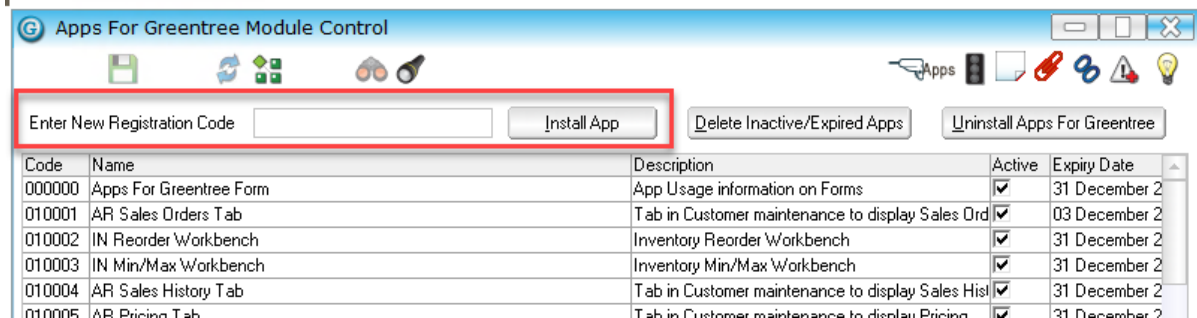
Complete fields for the communication and click [Save](#). The responses to the prompted questions will be stored against the specified Trees and UDF's and will be overwritten each time the page is saved.

## IMPLEMENTATION GUIDE

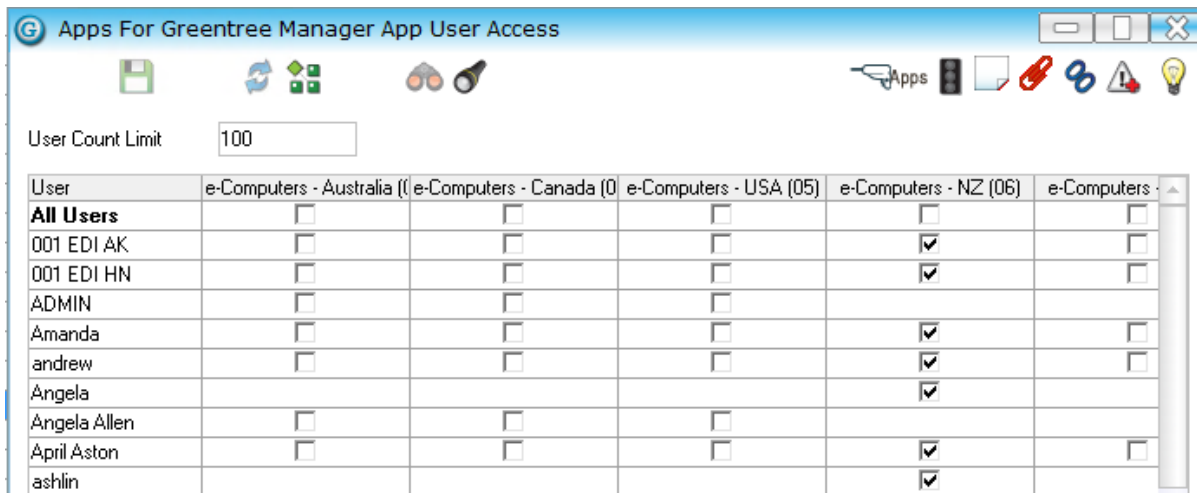
Please refer to the Important Notes section above before installing and configuring this App

### 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



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.



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

The screenshot shows the 'Webview Page Maintenance' interface. At the top, there is a title bar with the text 'Webview Page Maintenance' and a search icon. Below the title bar is a toolbar with various icons for navigation and editing. The main content area is divided into two sections. The top section, highlighted with a red box, contains three input fields: 'Code' with the value 'contactEntry', 'Name' with the value 'CRM Contact Entry', and 'Page Type' with a dropdown menu showing 'contactEntry'. The bottom section, titled 'Page Options', contains a table with two columns: 'Type' and 'Value'. The table lists various options with checkboxes, and the 'Hide Occupation' option is checked.

Type	Value
Hide Code	<input type="checkbox"/>
Hide Relationship	<input type="checkbox"/>
Hide Business Physical Address	<input type="checkbox"/>
Hide Business Postal Address	<input type="checkbox"/>
Hide Personal Physical Address	<input type="checkbox"/>
Hide Personal Postal Address	<input type="checkbox"/>
Hide Address Line 3	<input type="checkbox"/>
Hide Primary Flag	<input type="checkbox"/>
Hide Debt Collection Flag	<input type="checkbox"/>
Hide Reports To	<input type="checkbox"/>
Hide A/H Phone Number	<input type="checkbox"/>
Hide Gender and DOB	<input type="checkbox"/>
Hide Exclude from Mailing List	<input type="checkbox"/>
Hide Position	<input type="checkbox"/>
Hide Occupation	<input checked="" type="checkbox"/>
Display Full Name text	<input type="checkbox"/>

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.



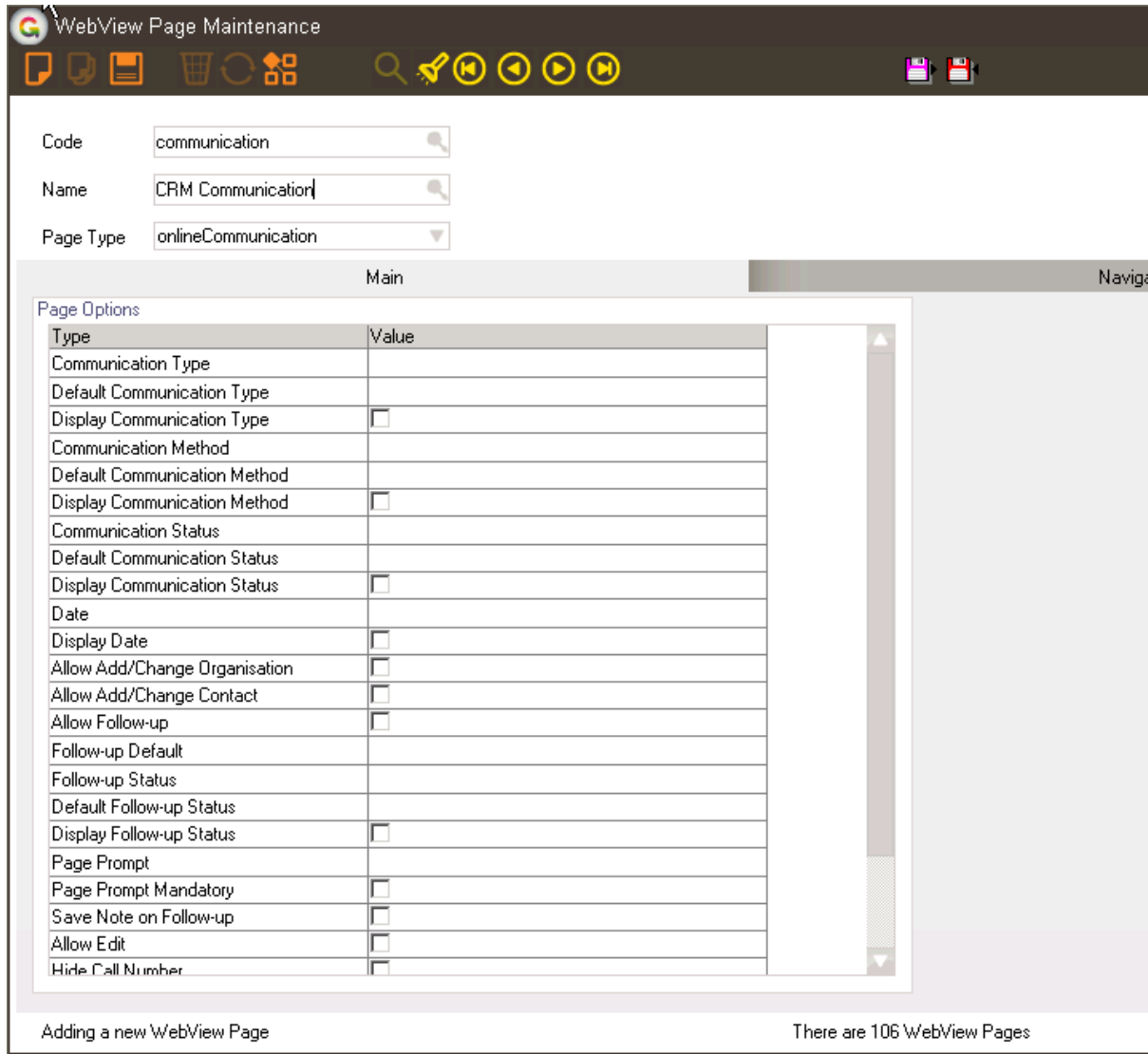
## ORGANISATION ENTRY

The screenshot shows the 'WebView Page Maintenance' interface. At the top, there is a toolbar with various icons including a search icon, a refresh icon, and a play icon. Below the toolbar, there are three input fields: 'Code' with the value 'orgEntry', 'Name' with the value 'CRM Organisation Entry', and 'Page Type' with a dropdown menu showing 'orgEntry'. Below these fields is a 'Main' section with a 'Page Options' table. The table has two columns: 'Type' and 'Value'. The 'Value' column contains checkboxes for each row.

Type	Value
Hide Physical Address	<input type="checkbox"/>
Hide Postal Address	<input type="checkbox"/>
Hide Address Line 3	<input type="checkbox"/>
Hide Parent Organisation	<input type="checkbox"/>
Hide Reseller	<input type="checkbox"/>
Hide Territory	<input type="checkbox"/>
Hide Industry	<input type="checkbox"/>
Hide Mobile	<input type="checkbox"/>
Hide Fax	<input type="checkbox"/>

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



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.



Code

Name

Page Type

Type	Value
Communication Type	Page Default
Default Communication Type	General
Display Communication Type	<input type="checkbox"/>
Communication Method	Page Default
Default Communication Method	WEB
Display Communication Method	<input type="checkbox"/>
Communication Status	Page Default
Default Communication Status	OPEN
Display Communication Status	<input type="checkbox"/>
Date	Today
Display Date	<input checked="" type="checkbox"/>
Allow Add/Change Organisation	<input type="checkbox"/>
Allow Add/Change Contact	<input checked="" type="checkbox"/>
Allow Follow-up	<input type="checkbox"/>
Follow-up Default	
Follow-up Status	
Default Follow-up Status	
Display Follow-up Status	<input type="checkbox"/>
Page Prompt	
Page Prompt Mandatory	<input type="checkbox"/>
Save Note on Follow-up	<input type="checkbox"/>
Allow Edit	<input type="checkbox"/>
Hide Call Number	<input type="checkbox"/>

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**

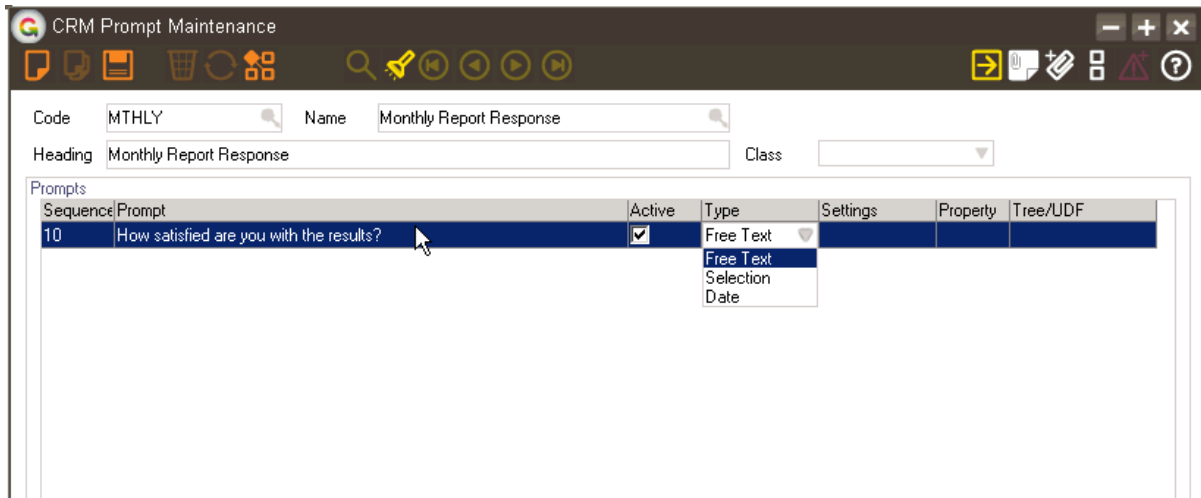
It will display a prompt on the page and the user has to pick the type when they are creating the communication.

**PROMPTED COMMUNICATIONS**

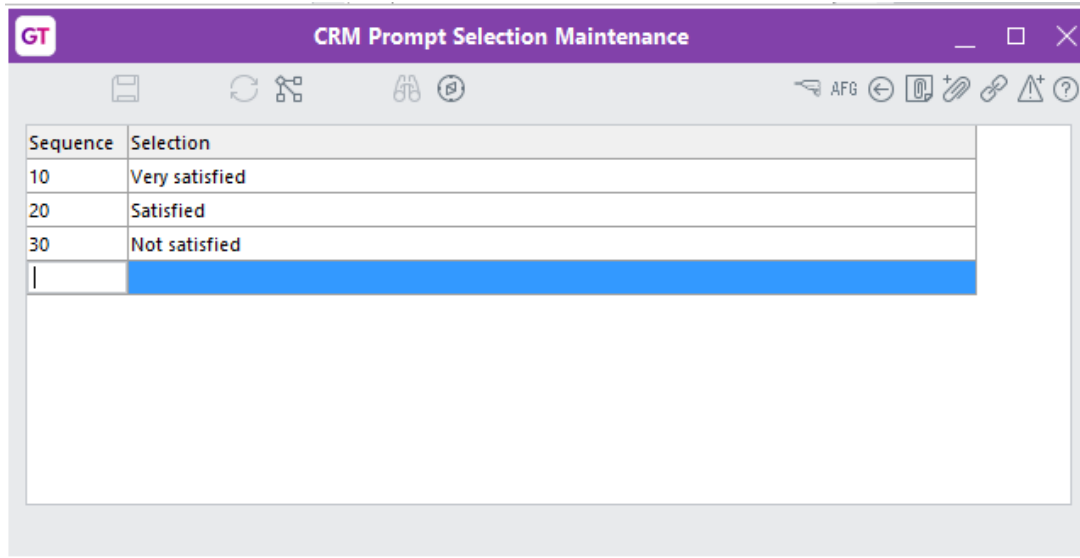
For Prompted communications you have a new menu option – you may have to log out and back in after installing the App.

[| System | WebView | CRM Prompt Maintenance |](#)

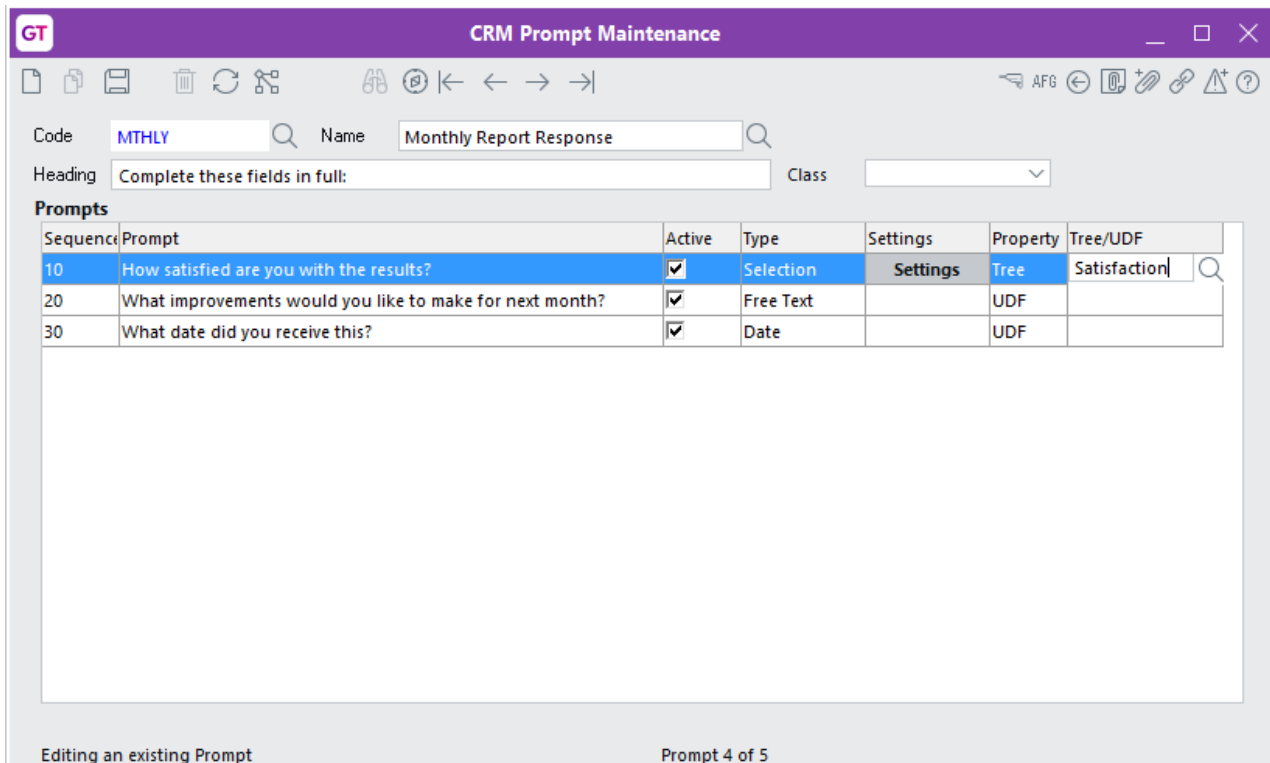
Prompts allow for recording responses within a communication to specific questions. The questions and the relevant answers can be setup to be asked in different circumstances.



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



- Select from **Property** whether the responses will be recorded in Greentree against a Tree or a UDF on the contact person.
- 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.



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

WebView Page Maintenance

Code: communicationPrompt

Name: CRM Prompted Communication

Page Type: onlineCommunication

Main

Page Options

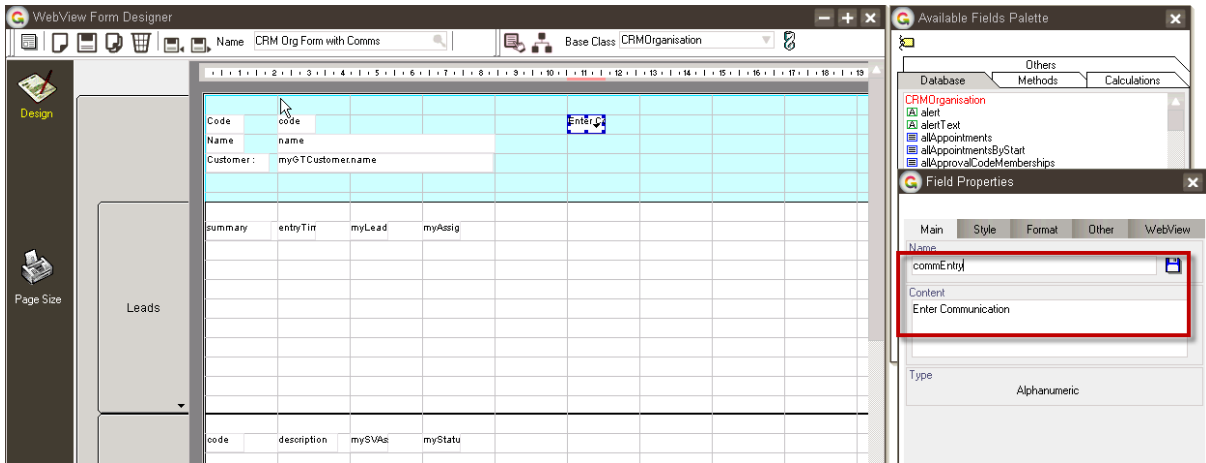
Type	Value
Communication Type	Page Default
Default Communication Type	General
Display Communication Type	<input type="checkbox"/>
Communication Method	Page Default
Default Communication Method	WEB
Display Communication Method	<input type="checkbox"/>
Communication Status	
Default Communication Status	CLOSE
Display Communication Status	<input type="checkbox"/>
Date	Today
Display Date	<input checked="" type="checkbox"/>
Allow Add/Change Organisation	<input type="checkbox"/>
Allow Add/Change Contact	<input type="checkbox"/>
Allow Follow-up	<input type="checkbox"/>
Follow-up Default	
Follow-up Status	
Default Follow-up Status	
Display Follow-up Status	<input type="checkbox"/>
Page Prompt	MTHLY
Page Prompt Mandatory	<input checked="" type="checkbox"/>
Case Note on Follow-up	<input type="checkbox"/>
Allow Edit	<input type="checkbox"/>
Hide Call Number	<input type="checkbox"/>

Editing an existing WebView Page

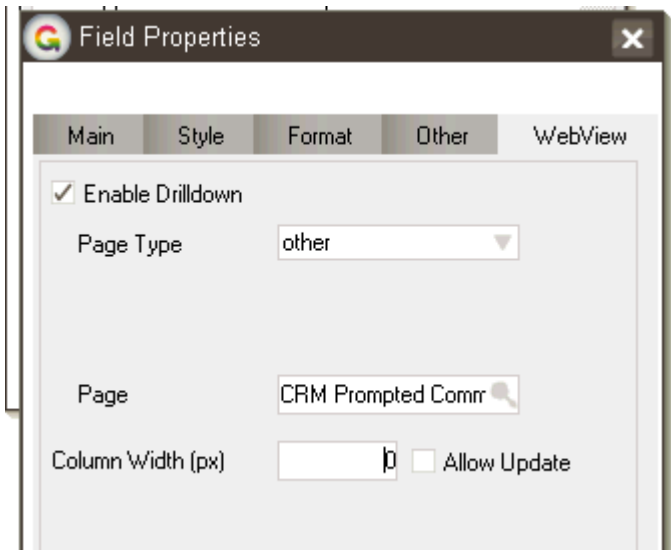
WebView Page 67 of 108

## SETTING UP FORMS

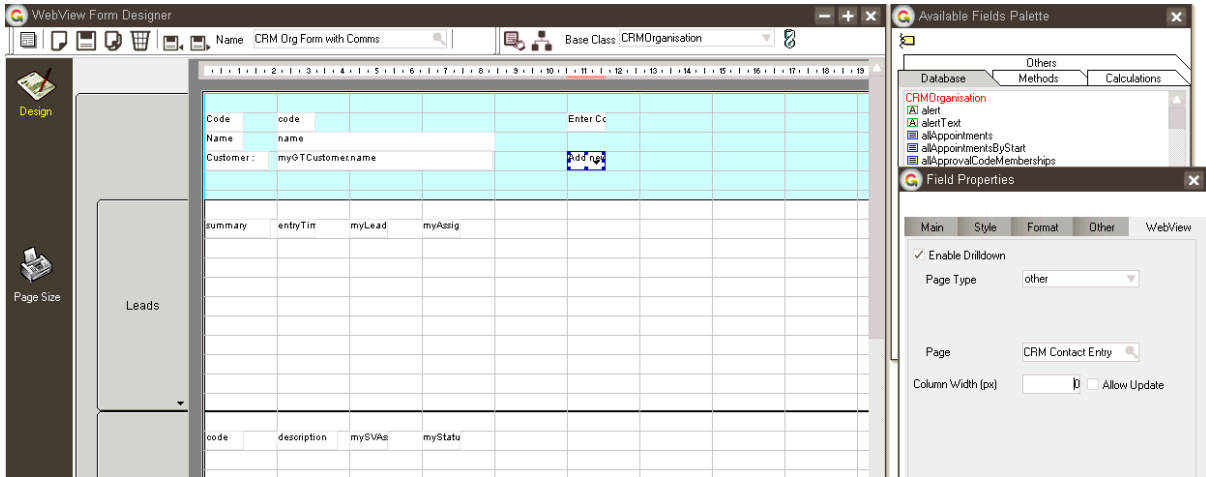
1. Once you have set up your prompts, you create a WebView page that calls those prompts.
2. You then must have a WebView Form that you add a label/button to, to enable entry of the communication.



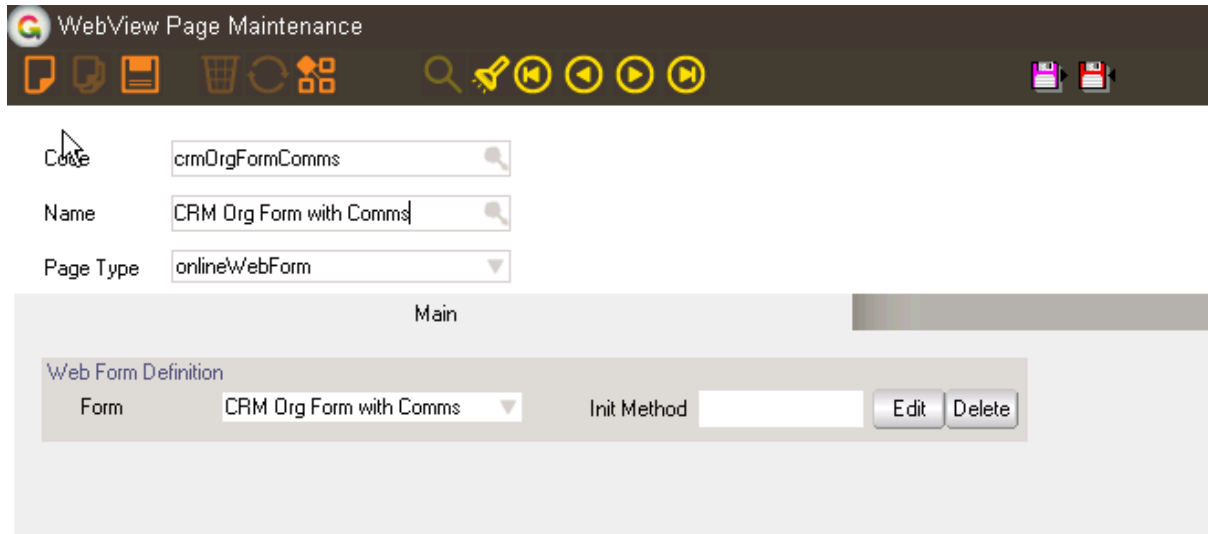
3. Drag a label onto the header, label the field and type in the text you want to display – remember to click the save button to save the field name



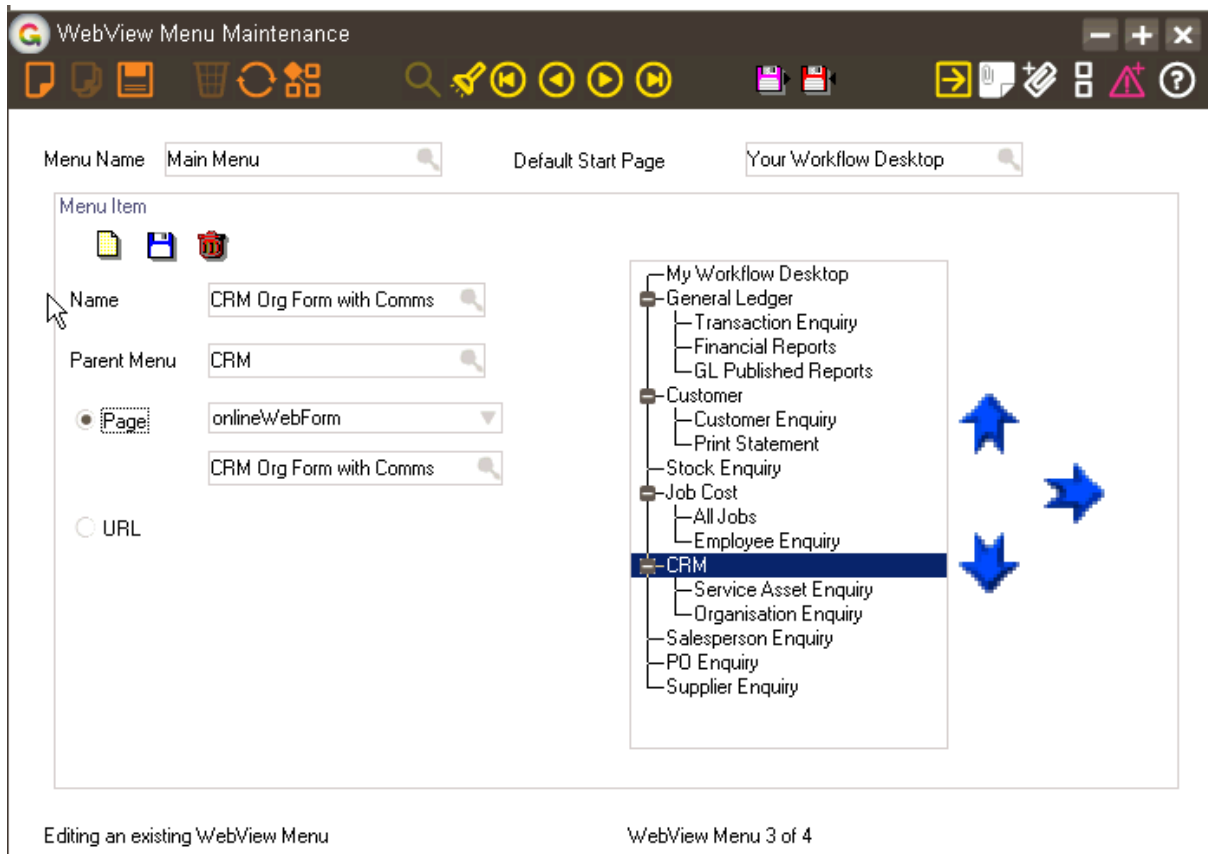
4. Click on the WebView tab then enable drill down and select your communication page



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

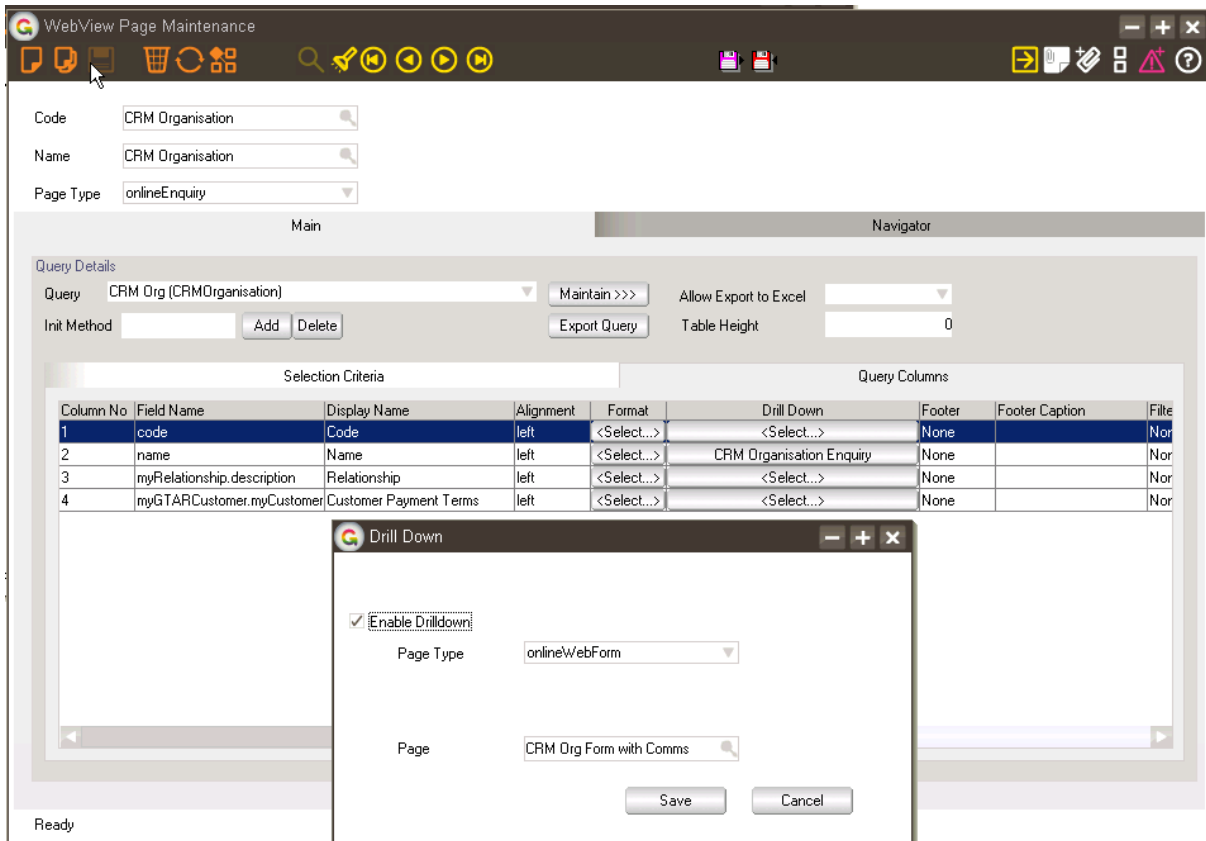


6. If you created your WebView form from scratch it should automatically create the WebView page for you – if it was copied, the page will need to be created manually.



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





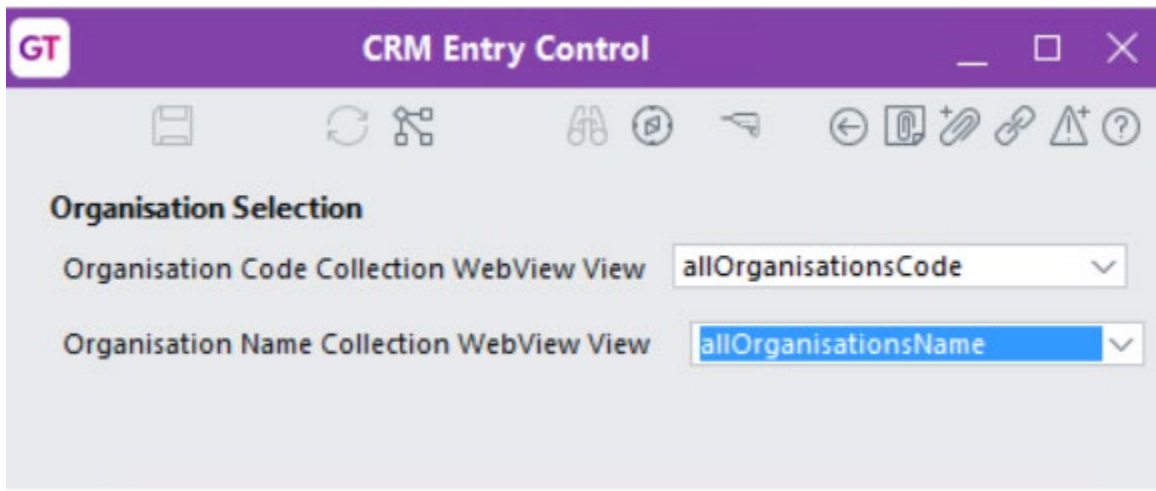
8. Drill from explorer query page.

---

## 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.



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.