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

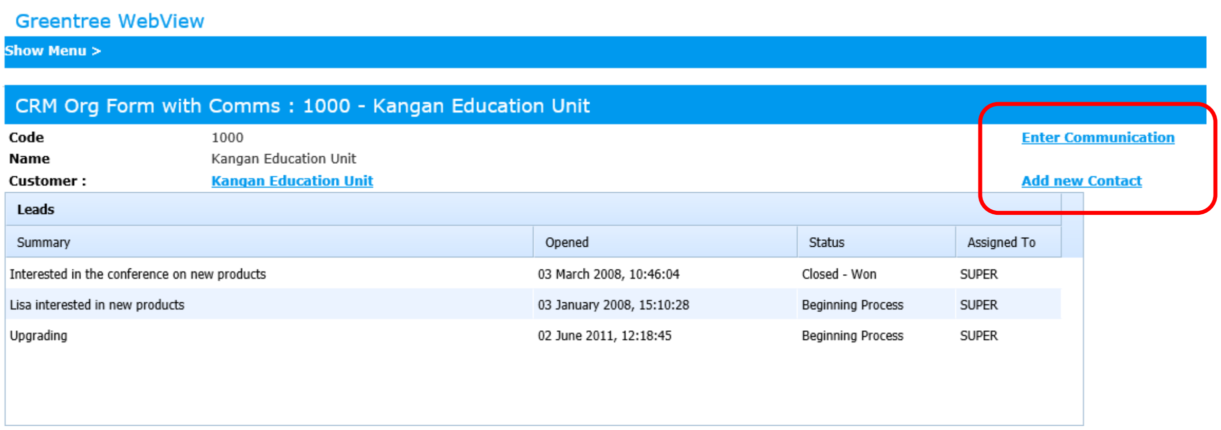
USER INSTRUCTIONS

WEBVIEW CRM MAINTENANCE

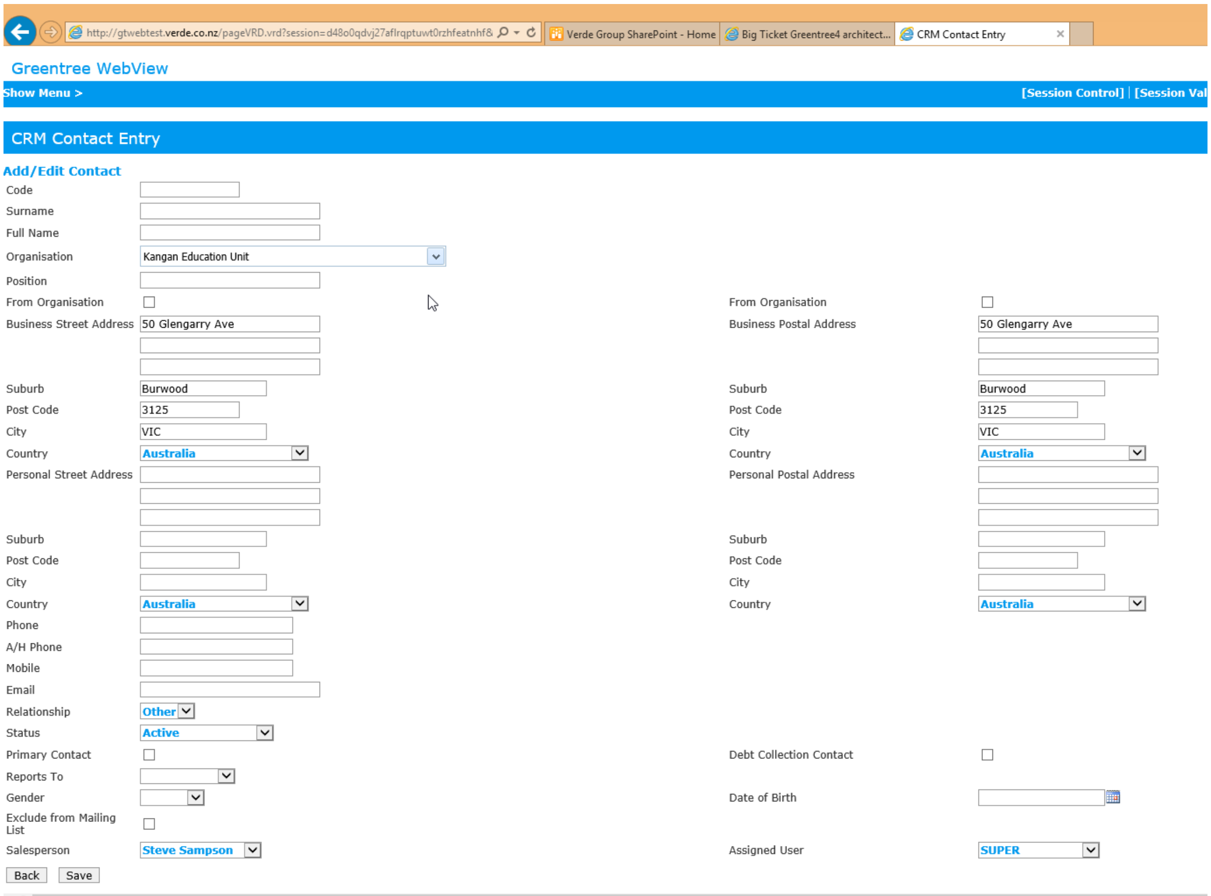
The WebView pages added by this app are CRM related.
These need to be configured in Greentree prior to use. The WebView screen below has been enabled by the web page configuration described in the following sections.
Without the app the page types required eg contactEntry, will not be available.

- Communications
- Organisation
- Contact
- Quote
- Contact Prompts

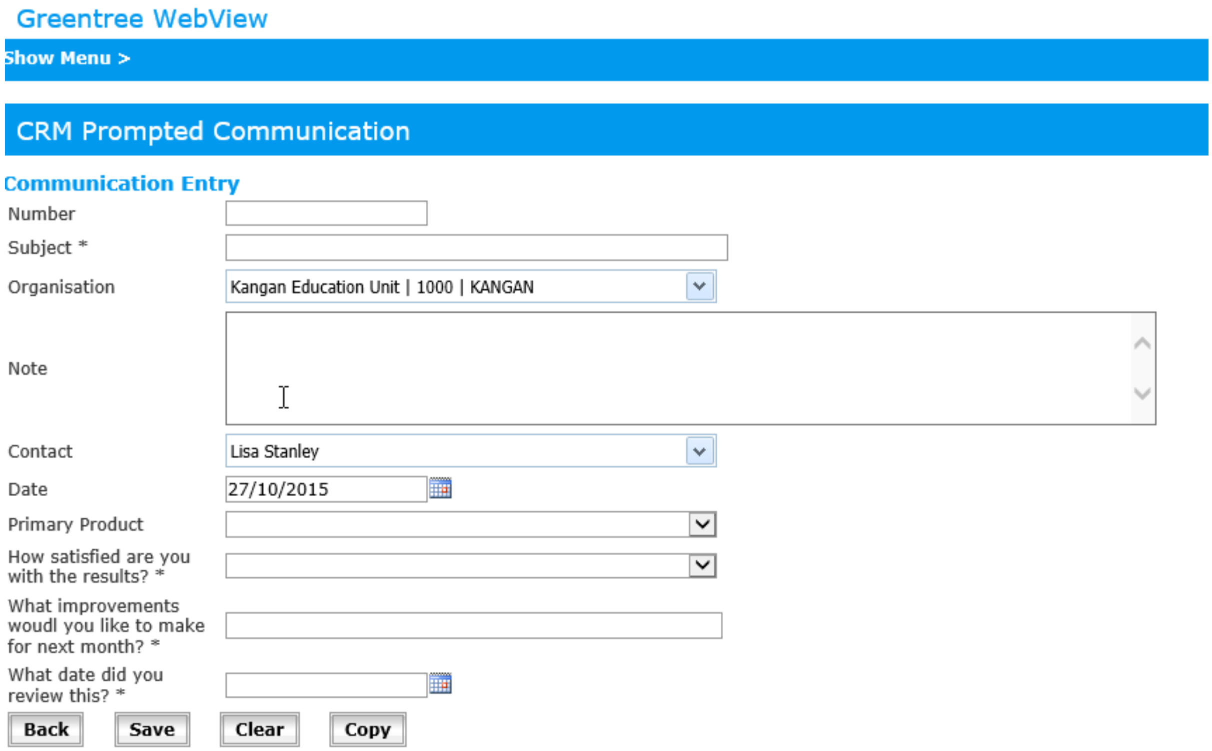
Login to the web and navigate to the page you added the drill down links to.



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



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



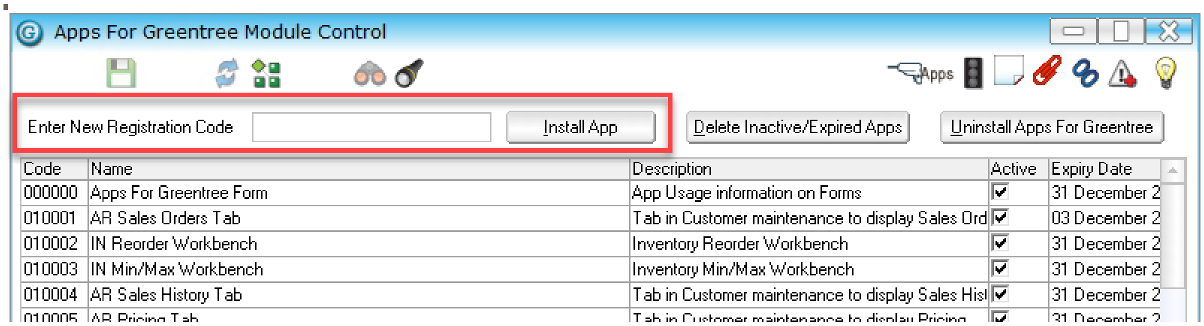
Complete fields for the communication and click Save. The responses to the prompted questions will be stored against the specified Trees and UDF's and will be overwritten each time the page is saved.

IMPLEMENTATION GUIDE

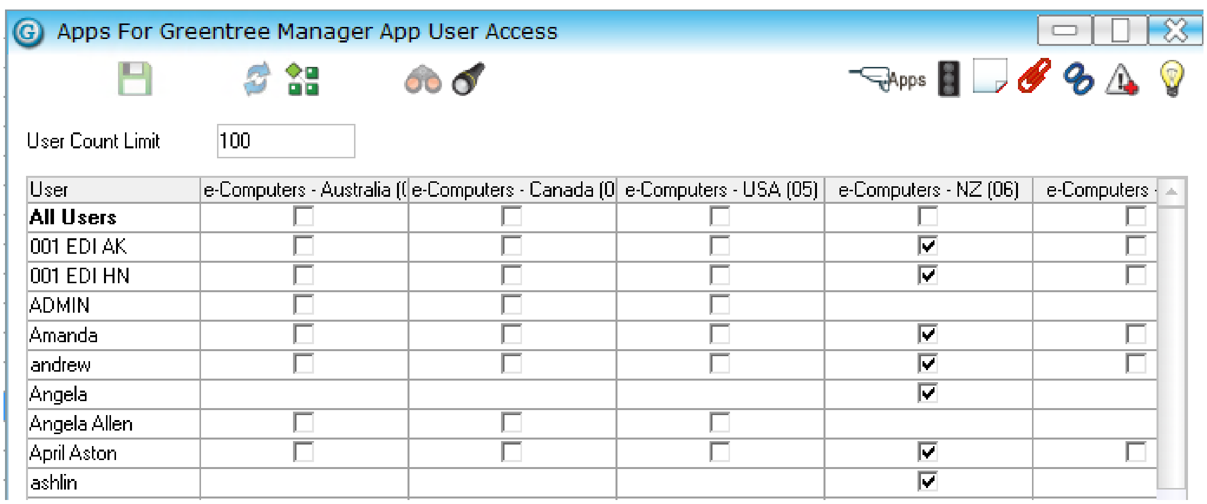
Please refer to the Important Notes section above before installing and configuring this App

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

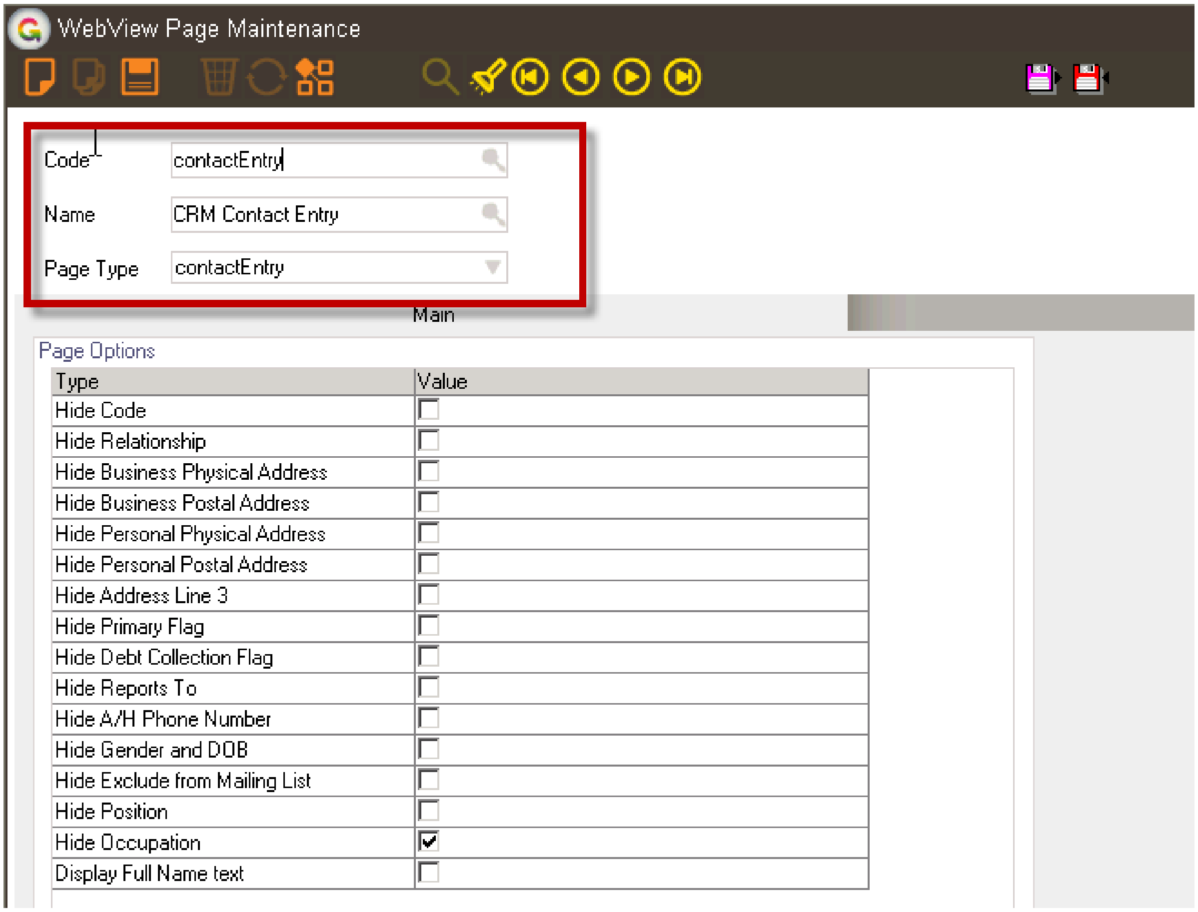
Complete the following set-up in Greentree before configuring the App.

WEBVIEW PAGE MAINTENANCE

Pages are hard-coded or semi coded.

| System | WebView | Page Maintenance |

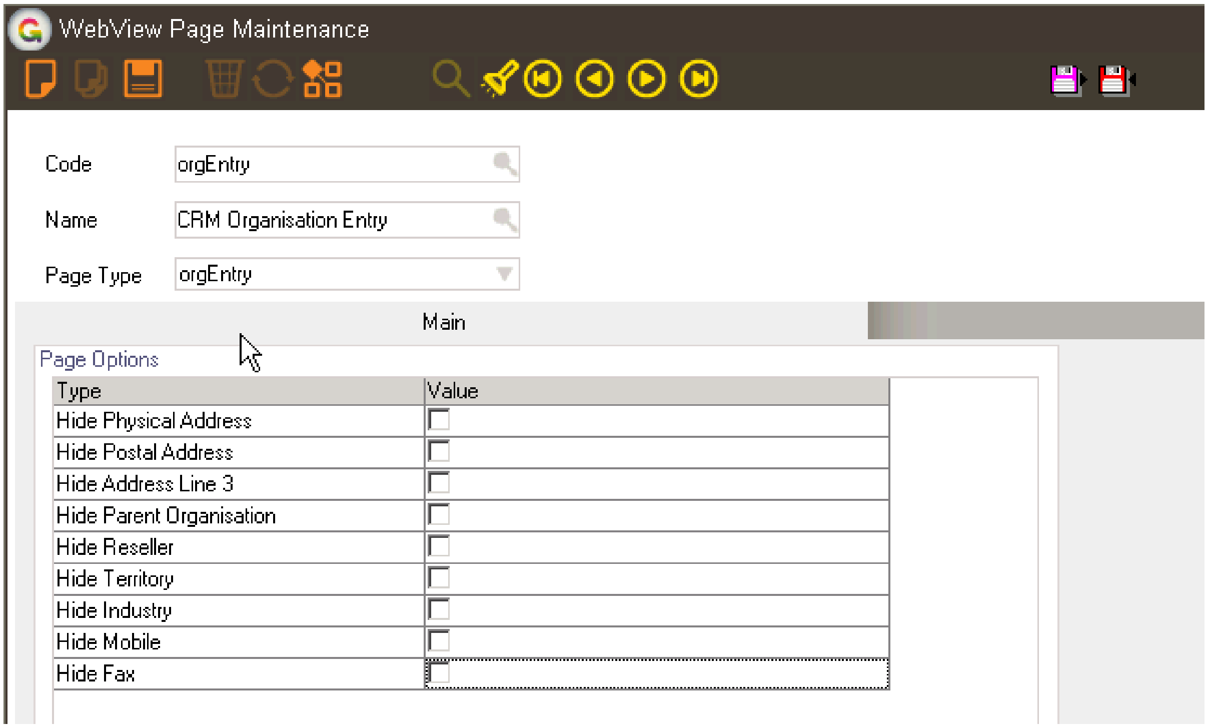
CONTACT ENTRY



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.

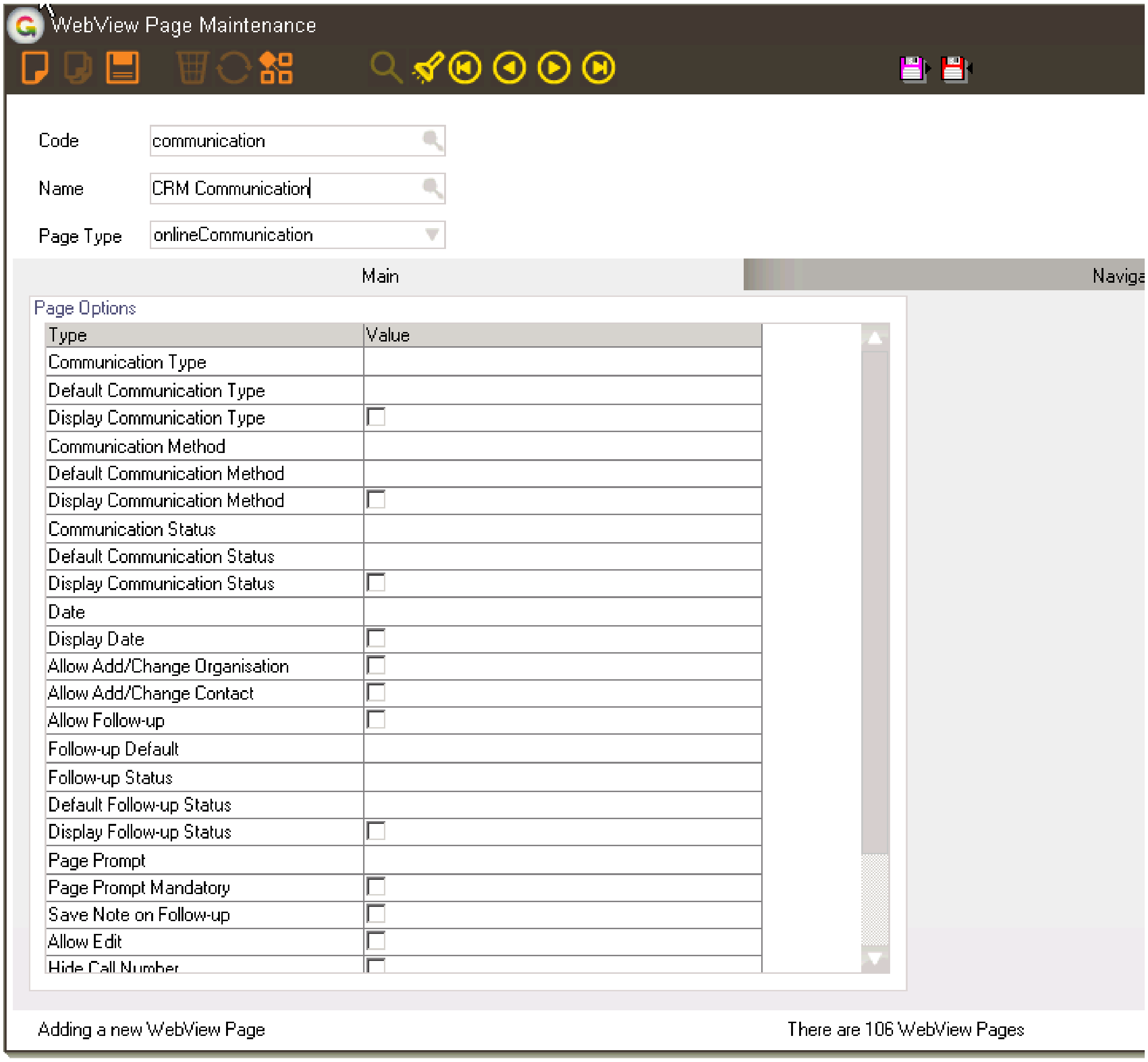
ORGANISATION ENTRY



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.

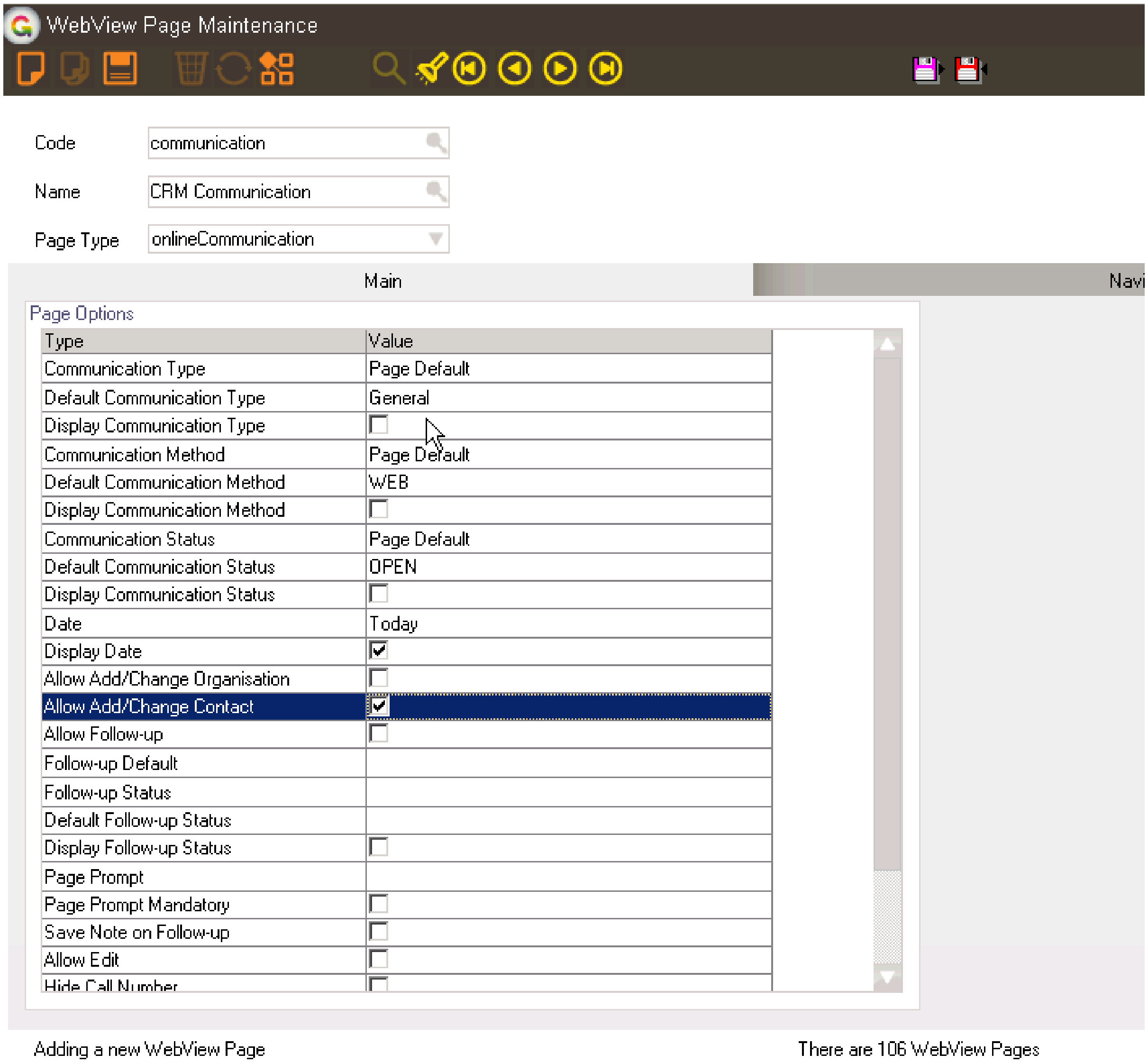
COMMUNICATION ENTRY



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.



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

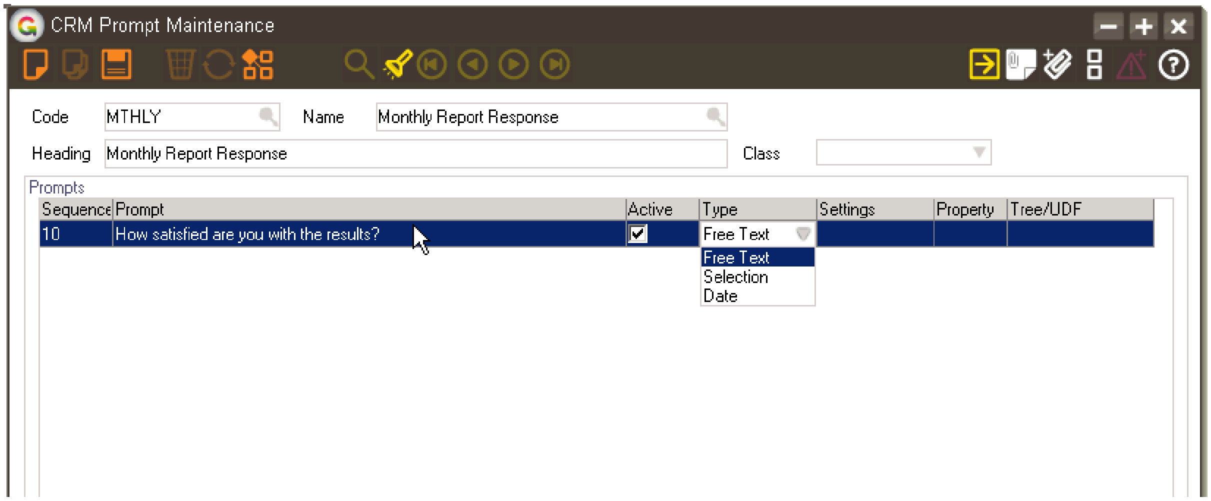
Module Default	This will refer back to the CRM module control and use the default specified there.
Page Default	This lets you select the type you want on the following line
Select	It will display a prompt on the page and the user has to pick the type when they are creating the communication.

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.



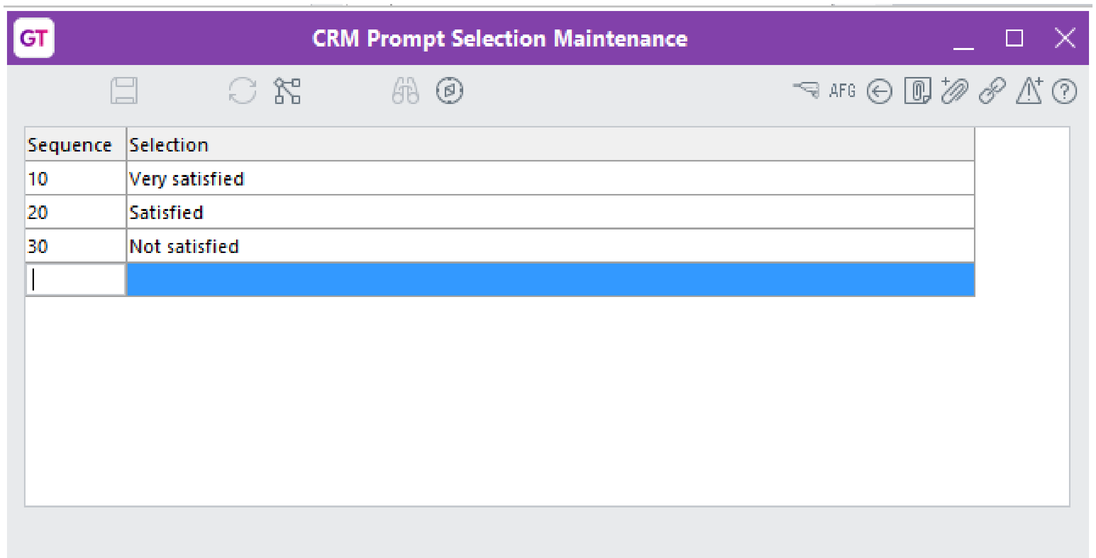
1. Give the prompt a Code and Name that explains its purpose.

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:

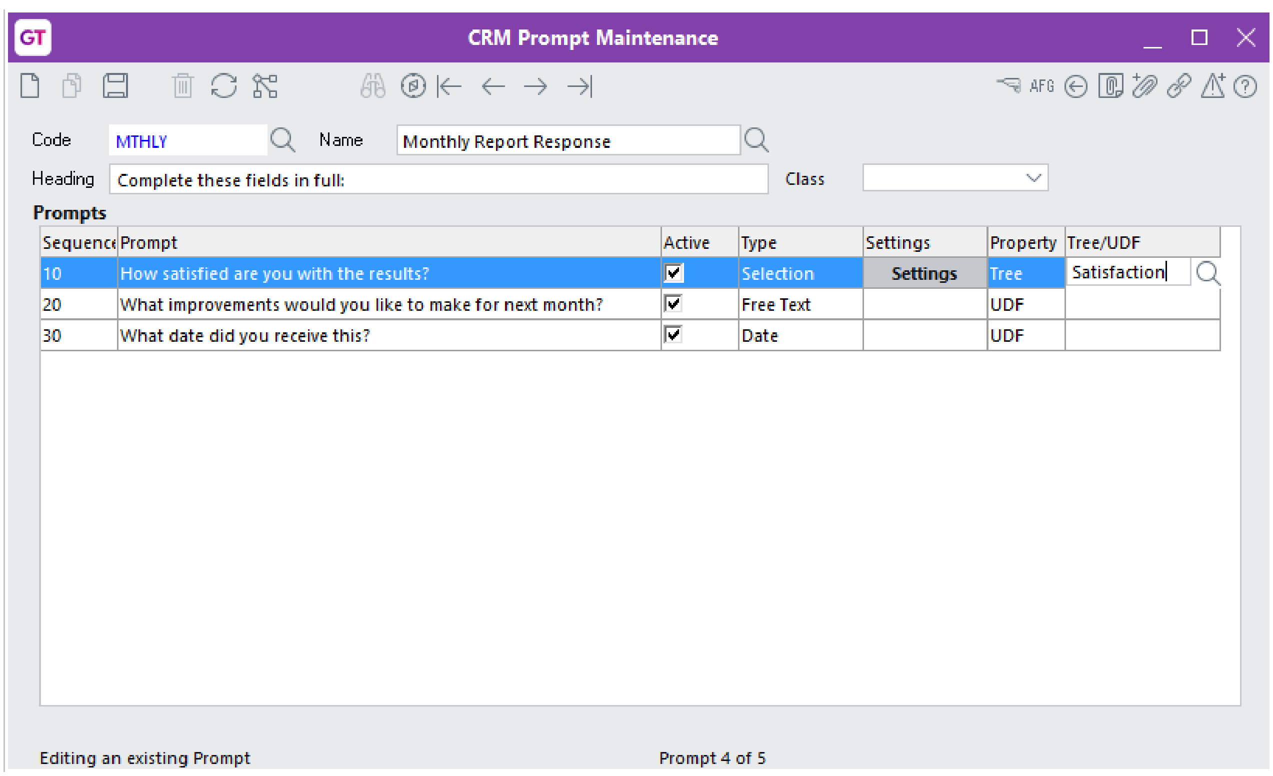
Free text	A string you can type free form text into
Selection	Activates a button to setup what the options should be – refer below
Date	Enables typing a formatted date

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

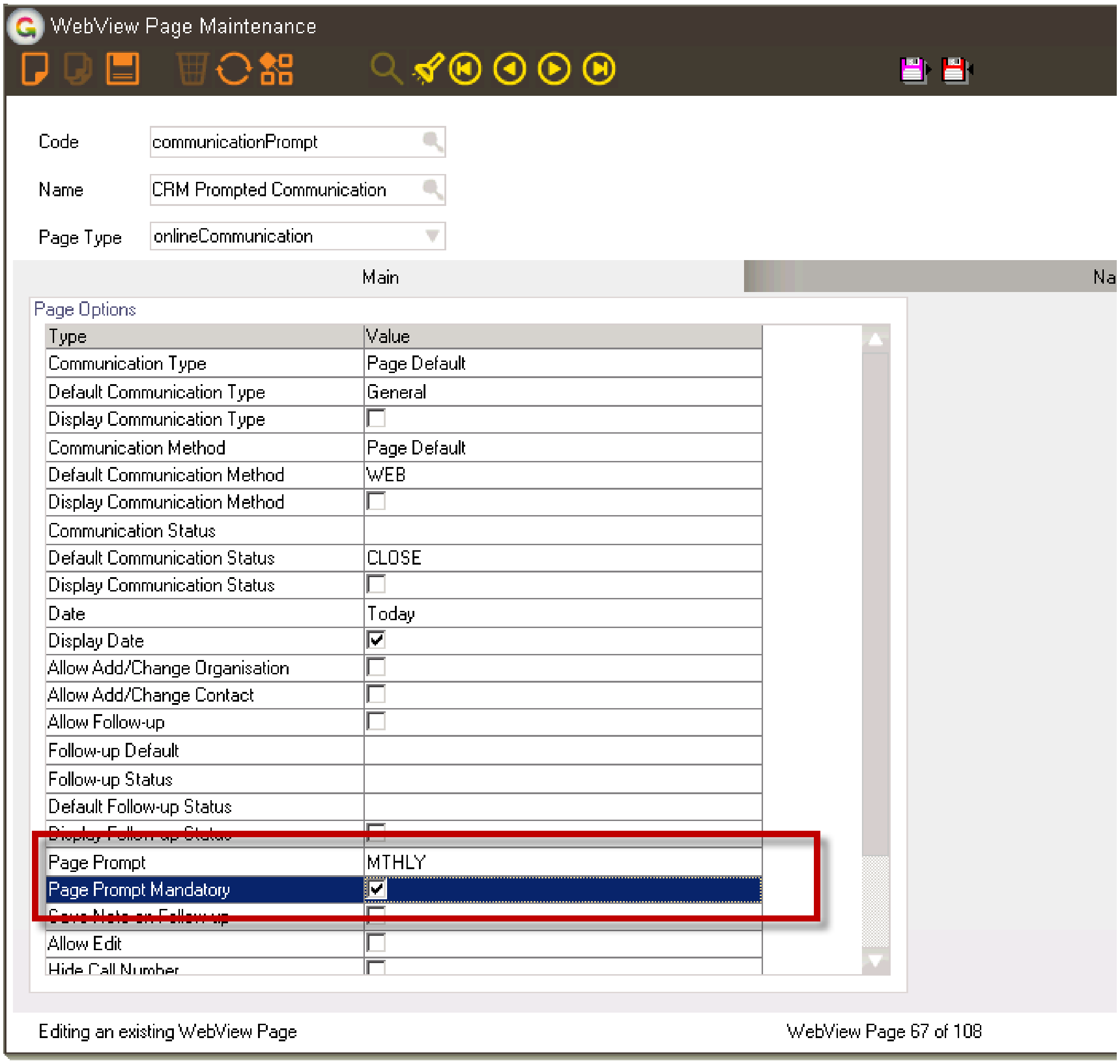


5. Select from Property whether the responses will be recorded in Greentree against a Tree or a UDF on the contact person.

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.



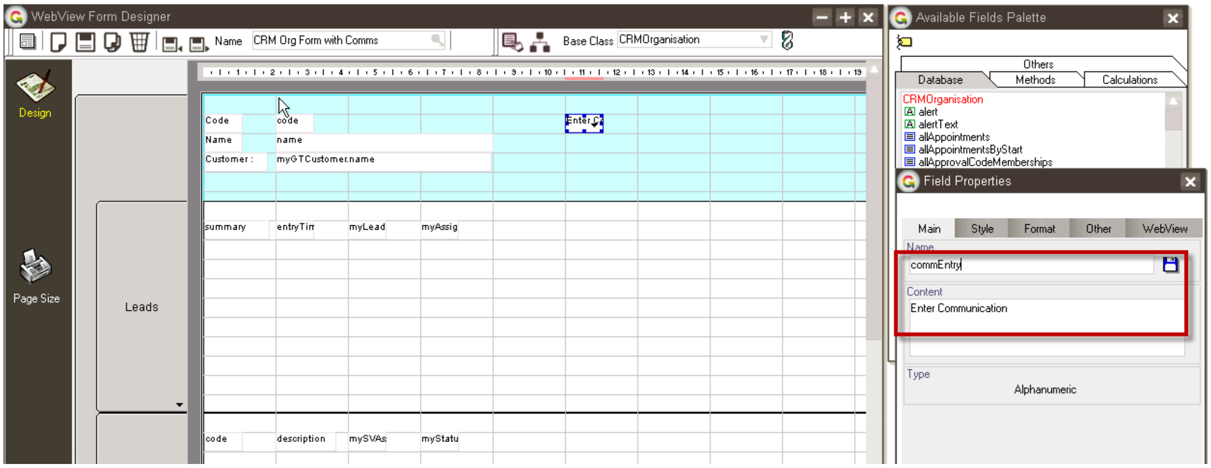
7. Specify the Prompt to use on the Communication Page. Example page:



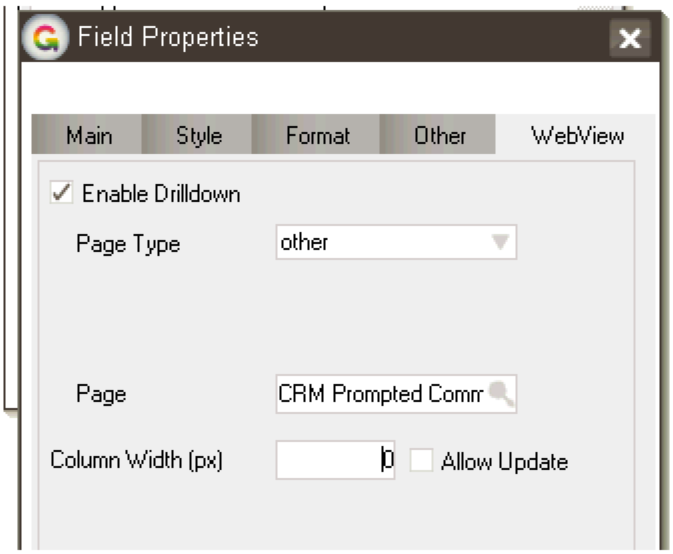
SETTING UP FORMS

1. Once you have set up your prompts, you create a WebView page that calls those prompts.

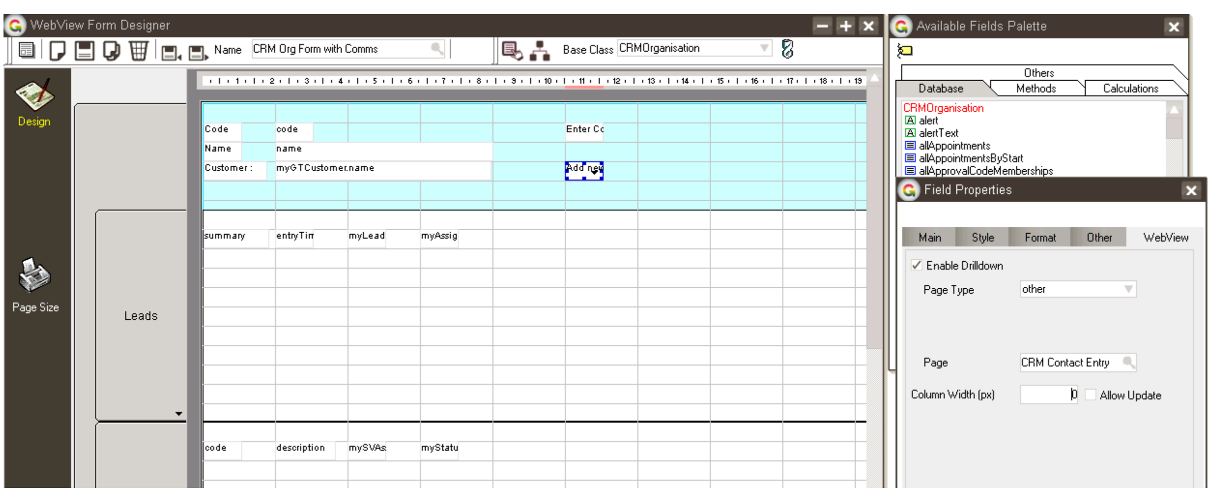
2. You then must have a WebView Form that you add a label/button to, to enable entry of the communication.



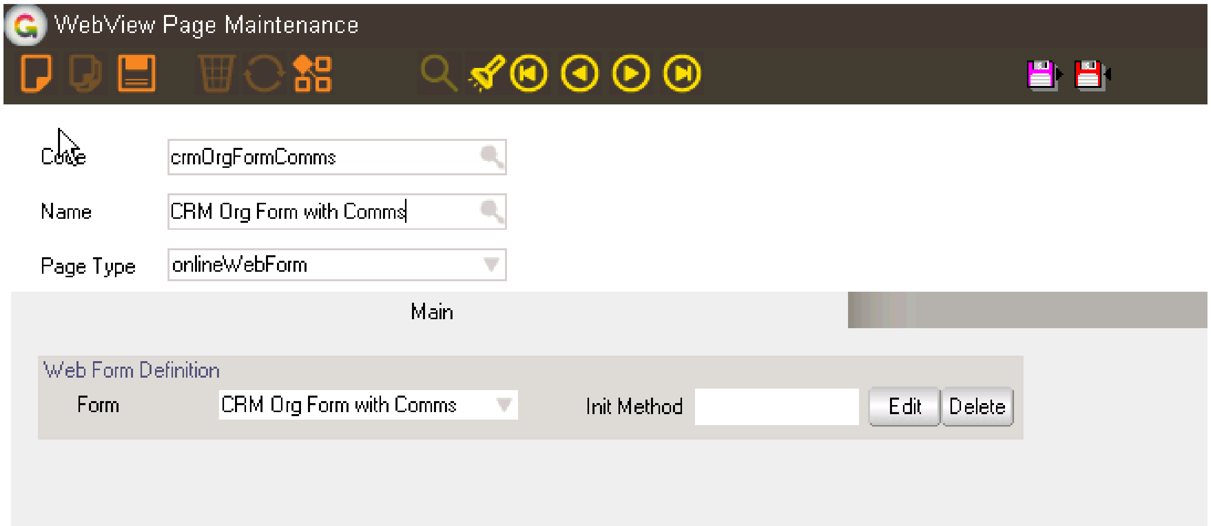
3. Drag a label onto the header, label the field and type in the text you want to display – remember to click the save button to save the field name



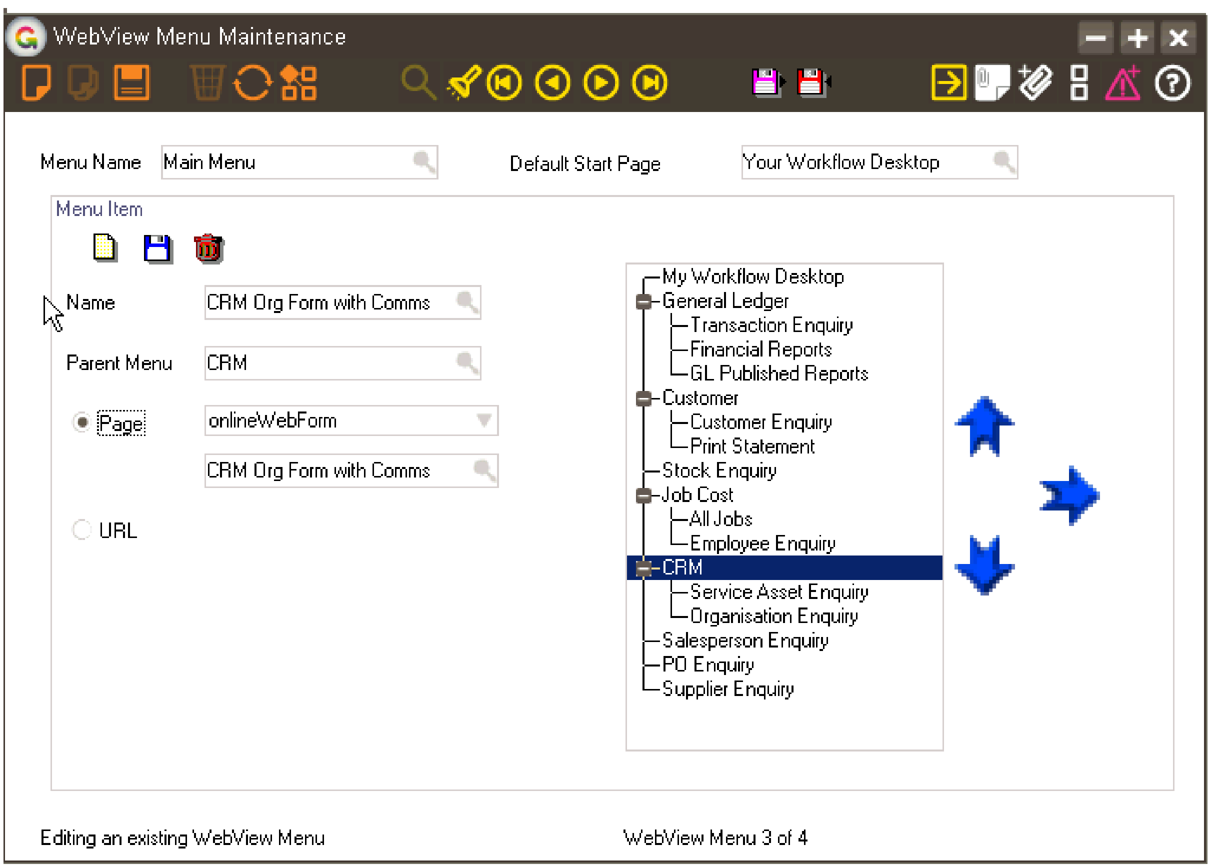
4. Click on the WebView tab then enable drill down and select your communication page



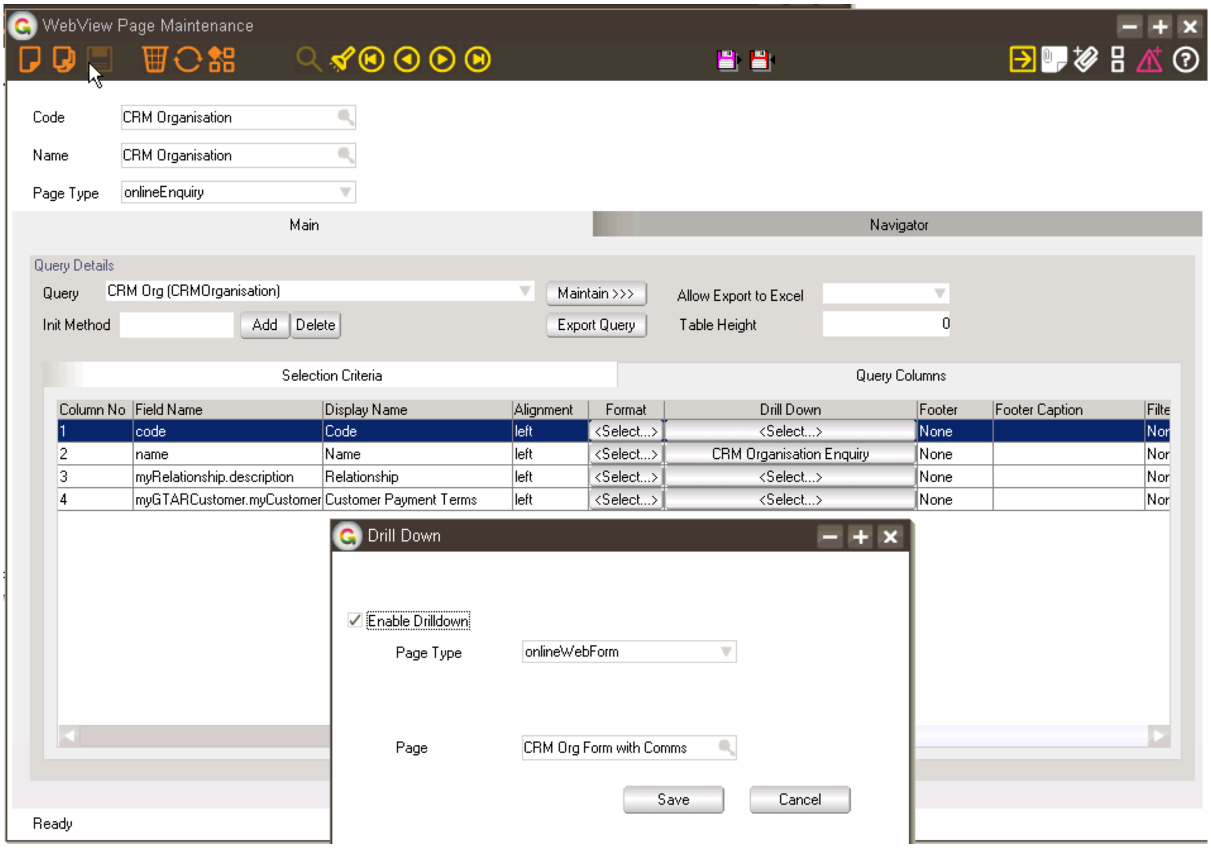
5. Enabling entry of a new Contact is done is the same way.



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

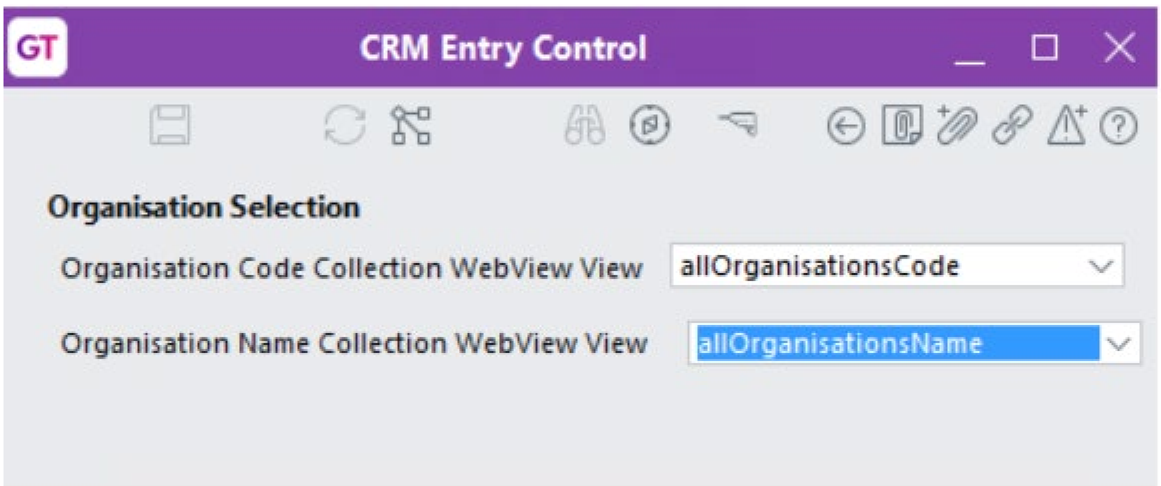


8. Drill from explorer query page.

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.