

VERSION 2.0  
OCTOBER 25, 2018

# Apps for Greentree

## SALES HISTORY TAB IN STOCK ITEM MAINTENANCE

APP NUMBER: 010020

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. Sales History Tab in Stock Maintenance

Do you find it hard to know which customers have been buying a stock item?

With this app, we have added a new "Sales History" tab to the Stock Maintenance and Enquiry screens, so that you can see customer sales grouped by customer, and then click the + to see the invoice detail.

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### 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.

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### OTHER REQUIREMENTS

**Greentree Modules:** Accounts Receivable, Inventory

**Associated Apps:** None

## USER INSTRUCTIONS

### INSTRUCTIONS

1. Select the menu item | [Data Entry](#) | [Inventory](#) | [Inventory Item Maintenance](#) | or the menu item | [Enquiry](#) | [Inventory](#) | [Inventory Items](#) |
2. Select the Stock Item to view in the usual manner using arrow keys, entering a Code or Description, or using the Advanced Search
3. Click on the [Sales History](#) tab

The screenshot shows the 'IN Inventory Item Maintenance' window with the 'Sales History' tab selected. The window title is 'IN Inventory Item Maintenance'. The code is '01AOPEN17MONITOR' and the description is 'AOpen 17" LCD Monitor'. The 'Sales History' tab is highlighted with a red box. The window contains various fields for item details, including analysis code, decimal item unit, job activity code, and type. There are also checkboxes for 'Track dimensions', 'Kitsets exist', 'Non diminishing', 'Keep warranty details', and 'Allow negative available'. A table on the right shows 'On-hand quantities' with values for On-hand, Committed to sales orders, Picked Qty, Un-picked Qty, Committed to factory orders, Committed to requisitions, Protected, Available, On-order, On-requisition, and On-shipment.

4. Refine your search by setting the [Selection Criteria](#):

The screenshot shows the 'IN Inventory Item Maintenance' window with the 'Selection Criteria' section expanded. The code is '01AOPEN17MONITOR' and the description is 'AOpen 17" LCD Monitor'. The 'Selection Criteria' section includes fields for 'From' and 'To' dates, a 'Name Search' field, and a 'Search Now' button. The 'Date >>' button is highlighted with a red box. Below the search criteria is a table with columns: Date, Type, Customer Code/Alph, Customer Name, Salesperson, Branch, Quantity, Price, Discount, and Discour.

[Date](#)

Click on the [Date](#) button to select from a number of predetermined periods, or specify [From](#) and [To](#) dates



- Code From / To**                      Select based on all, one or a range of Customer Codes
- Use Alpha**                              Tick this box and the Code Search uses the Alpha field allowing the From and To field to be alphabetical
- Salesperson**                            Select based on all, one or a range of Salespeople
- Name Search**                            Search for a customer based on part of their name

5. Click the **Search Now** button to show the records that match your selection criteria
6. Click the **+** to expand a record and show the Invoices that make it up

Selection Criteria

From: 01/01/90 To: 31/12/89

Code:                      zzzzzzzzz

Use Alpha

Salesperson: Sally Scoresby      Steve Sampson

Name Search:

Enter any number of words or partial words.

**Search Now**

+ Date	Type	Customer Code/Alph	Customer Name	Salesperson	Branch	Quantity	Price	Discount	Disco
- 30/04/11	IN	1000	Kangan Education Unit	Steve Sampson	02	11.00		0.00	
18/04/11	Inv	600000		Steve Sampson	02	5.00	816.75	0.00	
18/04/11	Inv	600001		Steve Sampson	02	6.00	816.75	0.00	
29/02/12	IN	1005	Wagin Secondary	Sally Scoresby	02	0.00		0.00	
+ 30/04/11	IN	1005	Wagin Secondary	Sally Scoresby	02	4.00		0.00	
+ 31/03/11	IN	1005	Wagin Secondary	Sally Scoresby	02	4.00		0.00	
+ 31/05/11	IN	1001	Highstone High	Sally Scoresby	02	5.00		77.69	

## 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

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the Sales History Tab in Stock Maintenance App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010020	IN Sales History Tab	Tab in Inventory Item maintenance to display Sale	<input checked="" type="checkbox"/>	31 December 2099	100-Edit User		

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
<b>All Users</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.