

VERSION 2.0

MAY 7, 2019

Apps for Greentree

GREENTREE OBJECT DRILL

APP NUMBER: 010022

Powered by:


MYOB Greentree

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FEATURES

1. Greentree Object Drill

This little time-saver App displays a Drill icon  on the toolbar of every screen in Greentree, allowing you to drill down to any level of object, record or transaction associated with the record you are viewing. From there you can double-click to open the record in its original form

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

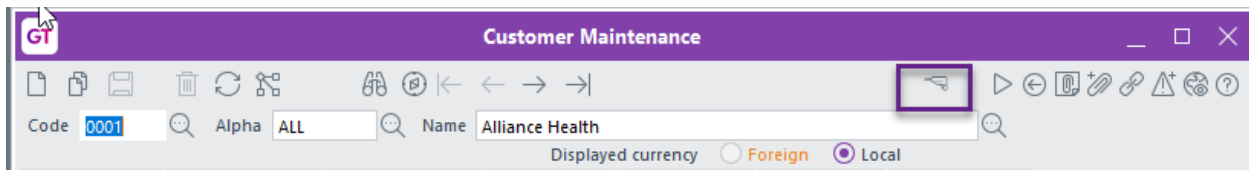
Greentree Modules: None

Associated Apps: None

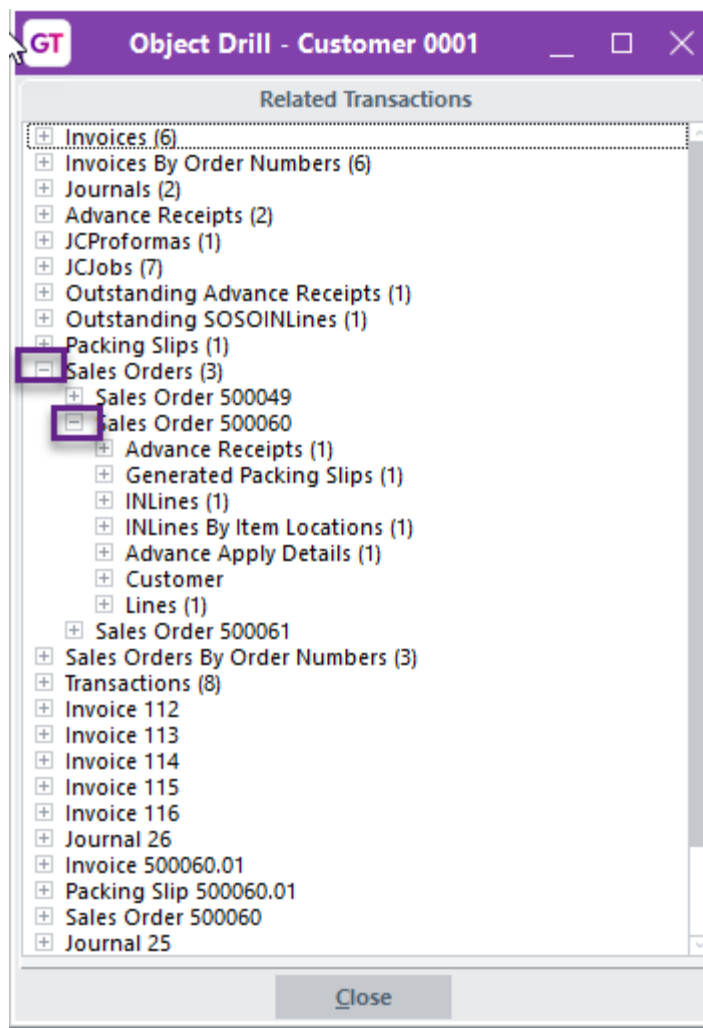
USER INSTRUCTIONS

INSTRUCTIONS

1. Click on the **Greentree Object Drill** icon.



2. The App pops up a window showing all other records related to that object.



- To drill further click on the **Plus** sign next to a record. This expands the list, to show all related records to that object. You may continue drilling down using this method until you find the record that you need.

Note: Click the **Minus** sign next to a record to collapse the expanded lines.

- Double-click on the record to view it in its original form.

The screenshot displays the 'SO Order Entry' window with the following details:

- Order Detail:** Number 500060, Branch 02 (Wellington), Order Date 31 / 07 / 16, Delivery Date 31 / 07 / 16, Location 02, Status Invoiced, Entered by SUPER.
- Customer Detail:** Code 0001, Name Alliance Health, Currency New Zealand, Rate 1.00000000 (Fixed), Discount 0.00 %, Salesperson Steve Sampson, Payment Terms 30 Days from Invoice Date.
- Print Options:** Packing Slip, Order Status, Invoice, On Hold, Cancel Order, Save Header.
- Summary:** Discount 0.00, Surcharge 0.00, Net 11,930.00, Tax 1,789.50, Total 13,719.50, Adv rec 3000.00.
- Line Item Table:**

No.	Type	Account/Code	Description	Location	UOM	Price Book	Quantity	Price	DelivDate	To
1	IN	01INTELD845EBG2	Intel Dual Core Deskto	02	EA	RETAIL	100.0000	119.3000	31/07/16	11930.

Read Only: This Sales Order is Invoiced

If payroll and AP invoice creation for deductions are used, you can now also drill from the AP invoice to see which staff members the deduction came from – this is subject to HR security.

The screenshot displays the Greentree software interface for an AP Invoice Entry. The main window shows a list of transactions for the period April 2018/2019 to April 2019. The selected transaction is HRAP03188, dated 01/04/19, with an amount of 939.88. The invoice details show the supplier as BT Lifetime Super - Planit, with a code of 50839. The payment date is 01/04/19. An Object Drill window is open, showing the related transactions for this invoice. The Object Drill window is titled 'Object Drill - Invoice HRAP03188' and shows a hierarchy of related transactions, including 'Gen Creditors Control Journal', 'Supplier Lines (1)', 'Lines By Unique Keys (1)', 'Source Apply Details (1)', 'Source Apply Details By UKeys (1)', 'Payment 201903 Super', 'HRAPInvoice 18768.3411', 'HRPay Line GLEmp Cost Lines (1)', '077530 (8) HR Pay GL 01.MM.55.3260 0.00 0.00', 'HREmp Cost Clearing Journal', 'HRPay', 'HRGenerated Journal', 'GLAccount', and 'Transaction'.

Period	Date	Tran	Ref	Batch	Subcode	Amount	Narration	Co Detail
April 2018/2019	01/04/19	AP Invoice	HRAP03188	434171		939.88	Australian Ethical Super payable for th	01 50839
April 2018/2019	01/04/19	AP Invoice	HRAP03189	434171		3,981.08	AMP Super payable for the period 01/C	01 50839

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 Greentree Object Drill App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010022	Object Drill Down	Functionality to drill down on a object	<input checked="" type="checkbox"/>	31 December 2049	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 Count Limit:

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<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.