VERSION 1.0

MAY 20, 2020

Apps for Greentree

JOB DESPATCH

APP NUMBER: 010037

Powered by:

MYOB Greentree

CONTENTS

FEATURES

1. **Allows a Job Despatching process that has a delayed completion.**

   This App allows you to despatch stock directly to jobs without affecting stock until the transfer is completed.

   There is overlap in Greentree configuration between this app, 010029 SO Despatch and 010025 SO Freight, and some behaviour will depend on whether one, two or all apps are enabled. Please refer to other app documents if either of the other two apps are in use as well.

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: Job Cost, Inventory

Associated Apps: 010029 SO Despatch, 010025 SO Freight (neither are mandatory)

USER INSTRUCTIONS

Job Despatch is enabled both directly from Job Maintenance, and via the menu path

| Data Entry | Job Cost | Job Despatch Request Entry.

JOB MAINTENANCE

1. A new button is provided with this App.

2. Clicking the Despatch Stock button brings up a Job Despatch Request form, to which items of stock can be added.

3. Once the inventory has been added here, the request can be printed and then completed. The actual quantity despatched needs to be entered.

4. Depending on the App configuration, the despatch may have to be printed before the Complete button is available.

5. If App 010029 is also enabled an additional Check button allows checking of stock. If 010029 not in use, then this button will not be present.

6. Once Complete has been clicked, the status will change to "Transferred" and the stock moved to the job as a normal IN Transaction of the type defined in the Module Control is created. Until the despatch request is completed, no processing will occur, so it can be saved and added to at a later time.

WORKFLOW PANEL USE
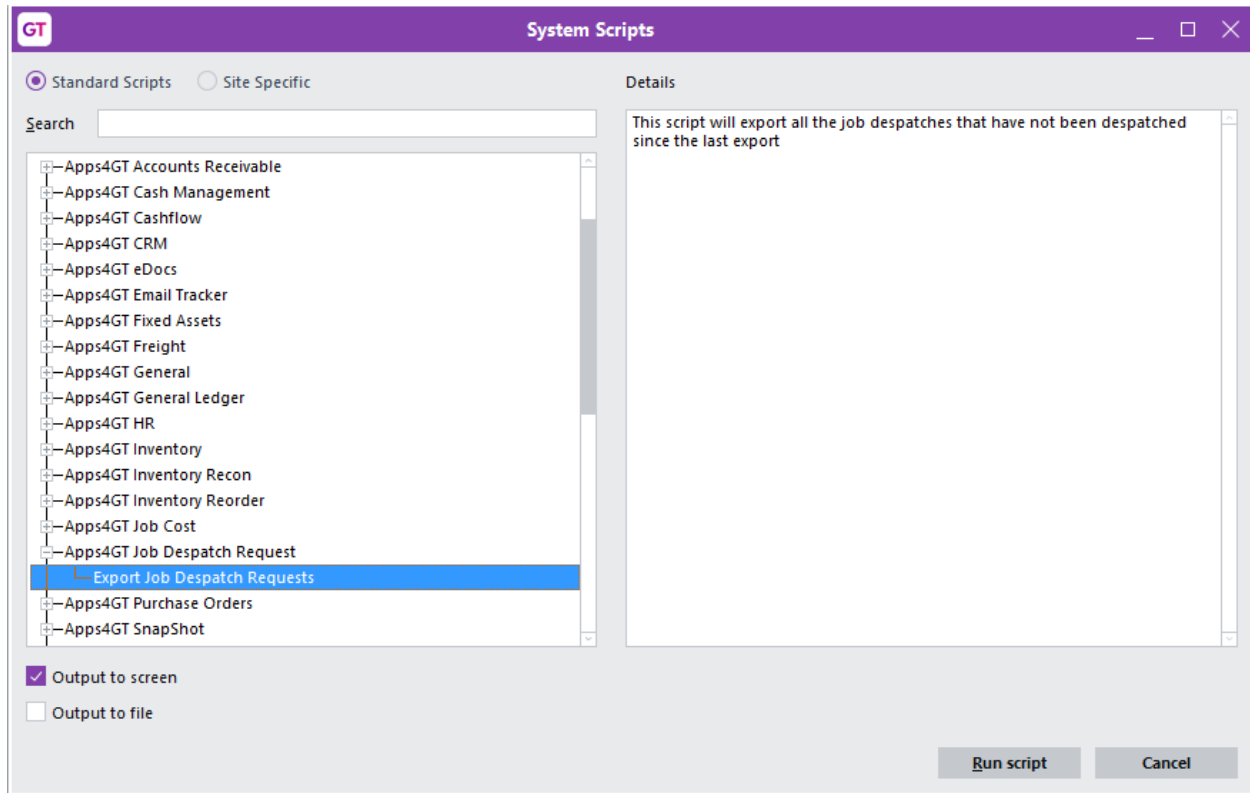
A workflow panel would be expected to be created to show outstanding Job Despatch Requests (on a status of Requested). See Greentree configuration notes on setup.

EXPORT JOB REQUESTS (INTERFACE)

A System script is available to create an interface file of all job despatches not already exported.

The format of the file is as per the Interface layout specified in the App configuration.
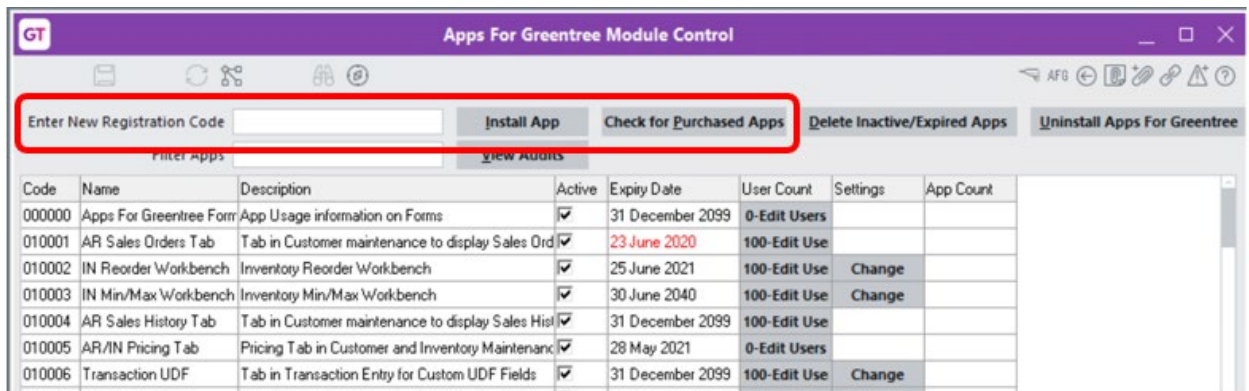
System Scripts

○ Standard Scripts   ○ Site Specific

Details

Search [   ]

This script will export all the job despatches that have not been despatched since the last export

- ⊞ —Apps4GT Accounts Receivable
- ⊞ —Apps4GT Cash Management
- ⊞ —Apps4GT Cashflow
- ⊞ —Apps4GT CRM
- ⊞ —Apps4GT eDocs
- ⊞ —Apps4GT Email Tracker
- ⊞ —Apps4GT Fixed Assets
- ⊞ —Apps4GT Freight
- ⊞ —Apps4GT General
- ⊞ —Apps4GT General Ledger
- ⊞ —Apps4GT HR
- ⊞ —Apps4GT Inventory
- ⊞ —Apps4GT Inventory Recon
- ⊞ —Apps4GT Inventory Reorder
- ⊞ —Apps4GT Job Cost
- ⊟ —Apps4GT Job Despatch Request
  - └ Export Job Despatch Requests
- ⊞ —Apps4GT Purchase Orders
- ⊞ —Apps4GT SnapShot

☑ Output to screen

☐ Output to file

[Run script]   [Cancel]

IMPLEMENTATION GUIDE

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

APP INSTALLATION
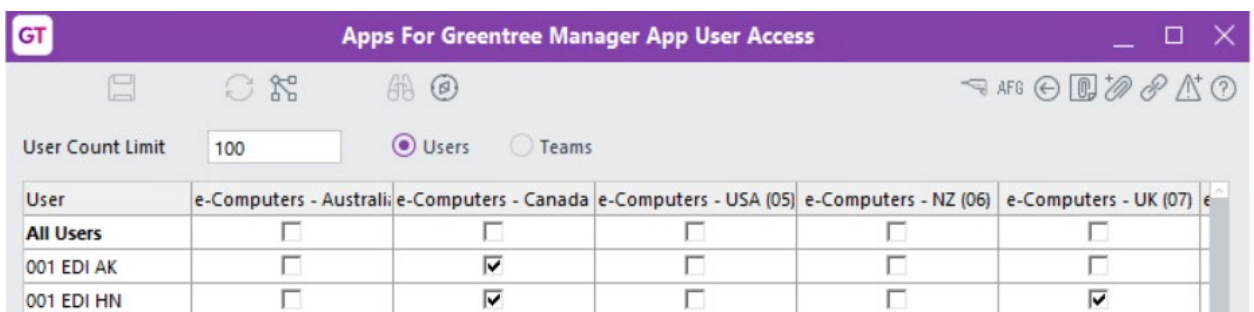
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Either enter the New Registration Codes supplied and click Install App or click the Check for Purchased Apps button to display a list of apps recently purchased or renewed to install in bulk.

4. Select/Highlight the Job Despatch App.

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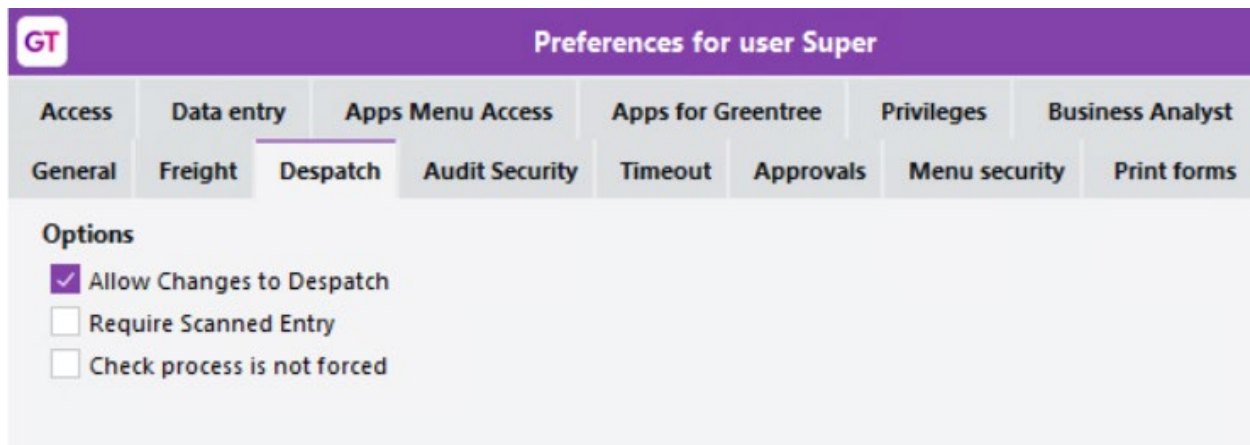

6. Once you have selected the users, Save the settings, and Close the window.

7. Save and Close the Module Control form.

OTHER GREENTREE CONFIGURATION

USER PREFERENCES

| System | System Setup | User Maintenance |

The Despatch tab contains these options with either of SO Despatch / Job Despatch apps enabled. The settings control behaviour on the Despatch Check form.

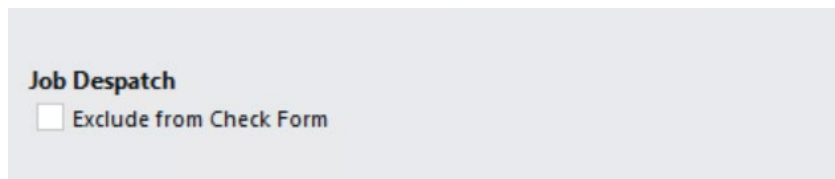|	
Allow Changes to Despatch	This is the user level control over changes to despatch
Require Scanned Entry	If this is not ticked then this user does not need to scan items (user level override of requirement to scan barcodes)
Check process is not forced	If this is ticked then Check step isn't required for user i.e. they are not forced into doing Check prior to Complete

LOCATION MAINTENANCE

| System | Inventory | Location Maintenance |

If using either SO Despatch 010029 or Job Despatch 010037 location maintenance there will be fields enabled.

If SO Despatch 010029 is not enabled this will only have Exclude From Check Form, under a heading Job Despatch.

The control affects background processing of quantity despatched (will always allow the quantity).

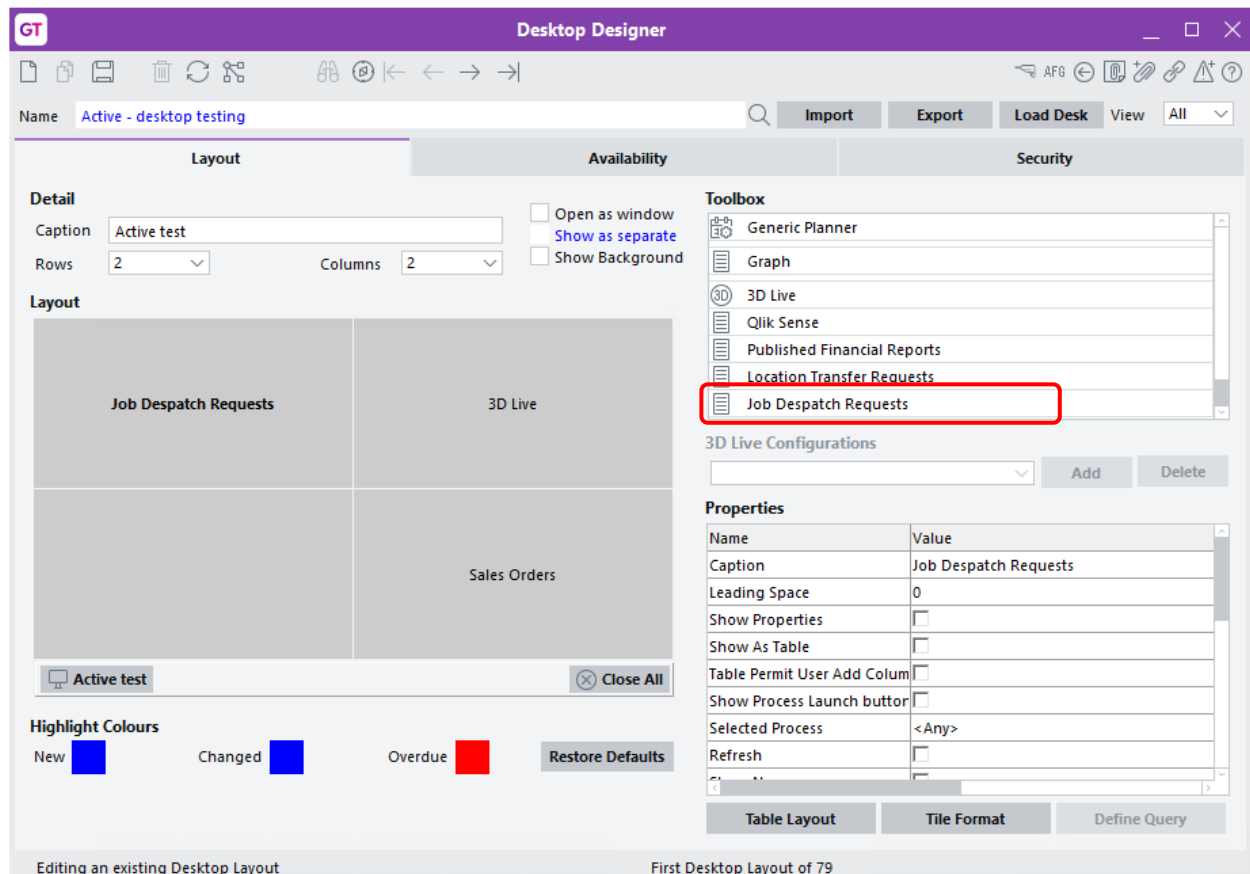|	
Exclude from Check Form	When location is used on a line it will not be included in Check Form

WORKFLOW PANEL

| Workflow | System | Organise Desks

Select "Job Despatch Requests" from the Toolbox.

REPORT FORMS FOR JOB DESPATCH

If creating report forms for Job Despatch Requests the class to use is JobDespatchRequest. Relevant statuses are Requested, Transferred.

INTERFACE SETUP

| System | System Setup | Interface Maintenance |

An interface layout can be defined for Job Despatch Requests. This is used by the System Script Export Job Despatch Requests. Select Interface type of Apps Job Despatch request Interface. The interface is defined using standard Greentree functionality.

Tick Only include lines with Location to include just those with locations specified.

APP CONFIGURATION

Job Despatch Control

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

Transaction Type	This is the transaction type that will be generated when job dispatch is used.
Require Print Labels First	Tick this is printing of barcode labels must precede processing job despatch.
Report Forms	Select report format to be used at Job Despatch.
Allow Changes to Despatch	Indicates if changes can be made to the despatch Request after Completed. If ticked then after it has been completed, an Uncomplete button is enabled
Export Interface	Select an Interface file previously specified if applicable to be used with the Export Job Despatch Requests script