Apps for
Greentree

DISPLAY SUBSTITUTE INVENTORY ITEM AVAILABILITY

APP NUMBER: 010039

Powered by:

MYOB Greentree

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FEATURES

1. **Display a list of substitute inventory items during Order Entry, including their availability and price.**

   If you stock a large range of similar products and need to be able to quickly identify alternatives, when the product a customer requires is not available, this App is for you. It displays a list of all substitute items including their availability and price.

   ## 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.
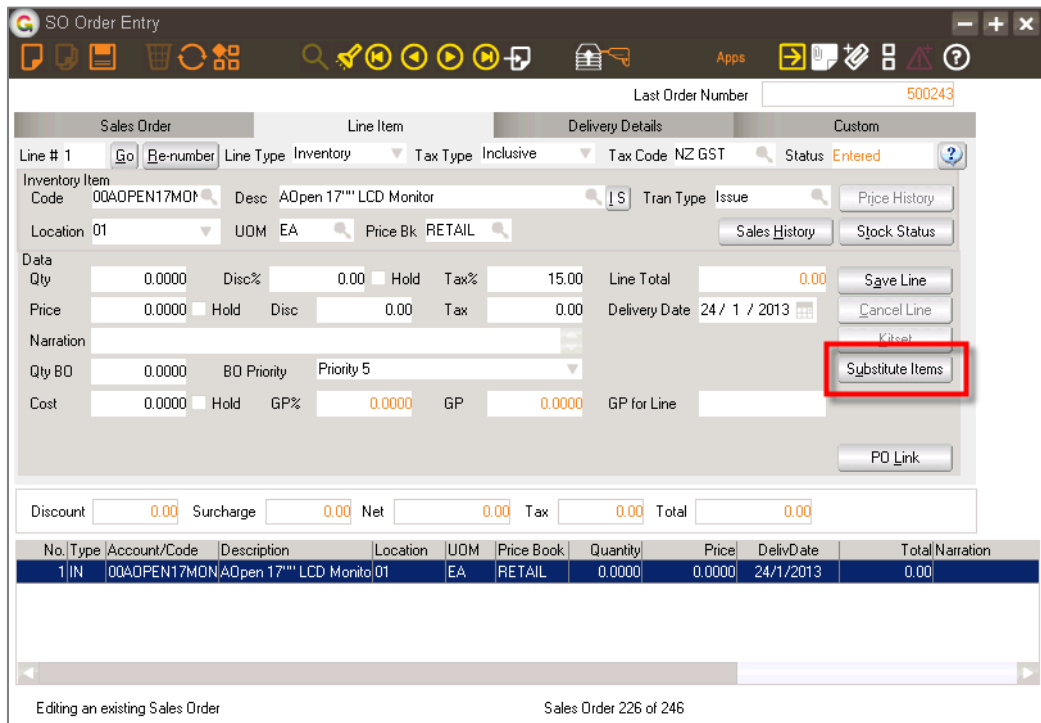
   ## OTHER REQUIREMENTS

   Greentree Modules: Inventory, Sales Orders, Point of Sale
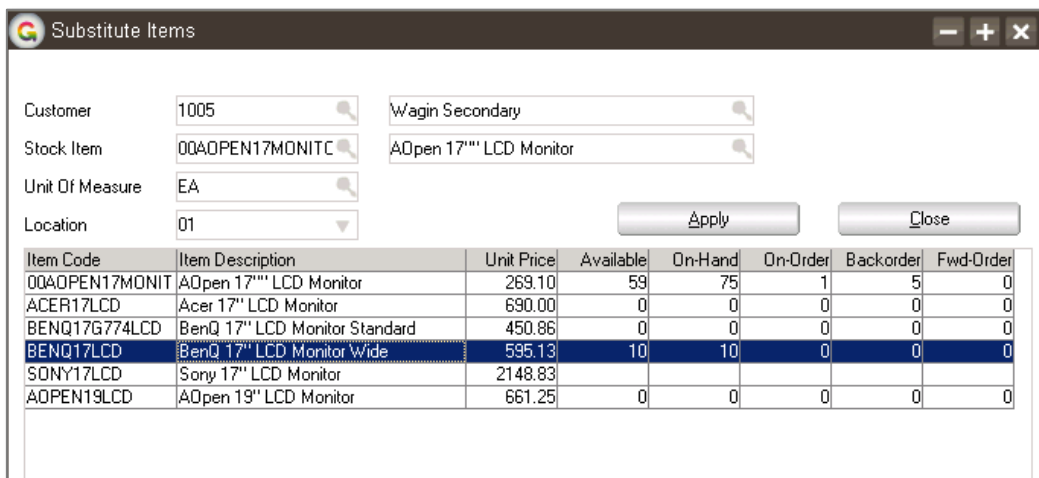
   Associated Apps: None.

USER INSTRUCTIONS

ORDER ENTRY

1. Select the menu item | Data Entry | Sales Orders | Sales Order Entry |
2. Select the inventory item requested by the customer
3. Click on the Substitute Items button or Alt U shortcut key

4. Review the items displayed in the Substitute Items form. Price and quantity information is displayed for all items. Price is only available if a customer code has been passed into the form.

5. To supply a substitute product, click on the desired line then click the Apply button

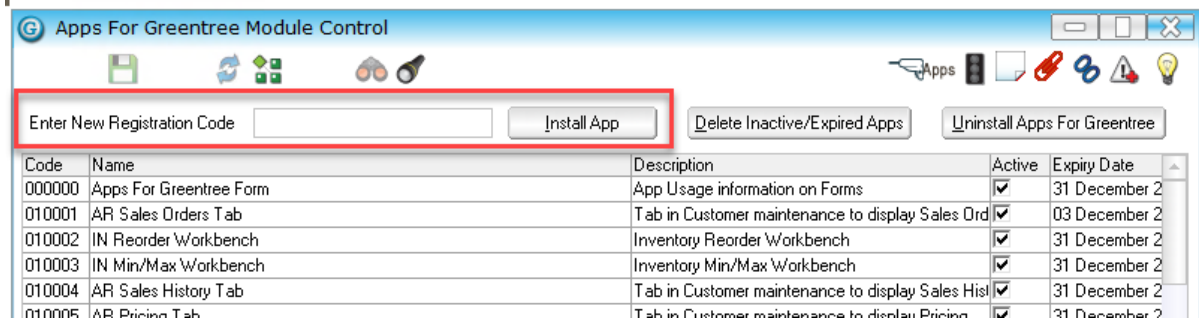6. The selected Substitute will have been returned to your form and replaced the original item entered.

This functionality is also available from Point of Sale, Transaction Entry

IMPLEMENTATION GUIDE

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

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APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
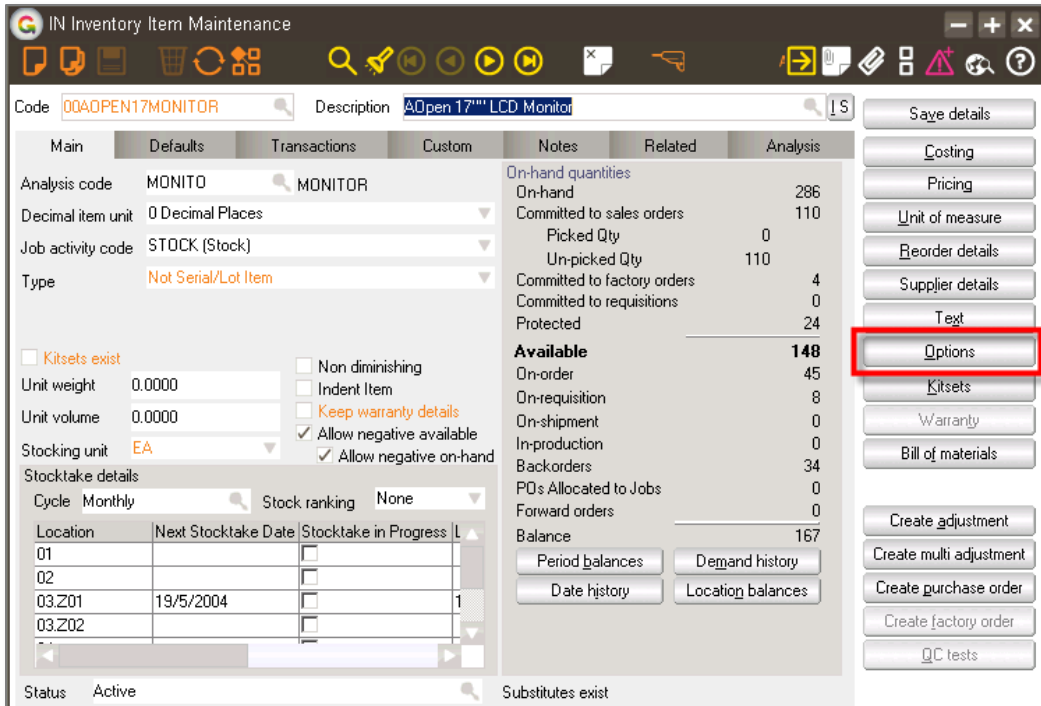3. Enter the New Registration Codes supplied and click Install App

4. Select/Highlight the Substitute Item Availability App.
5. Click on the Edit Users button and select the users who will be configured to use Substitute Item Availability, for which companies.
6. Save and Close the form.

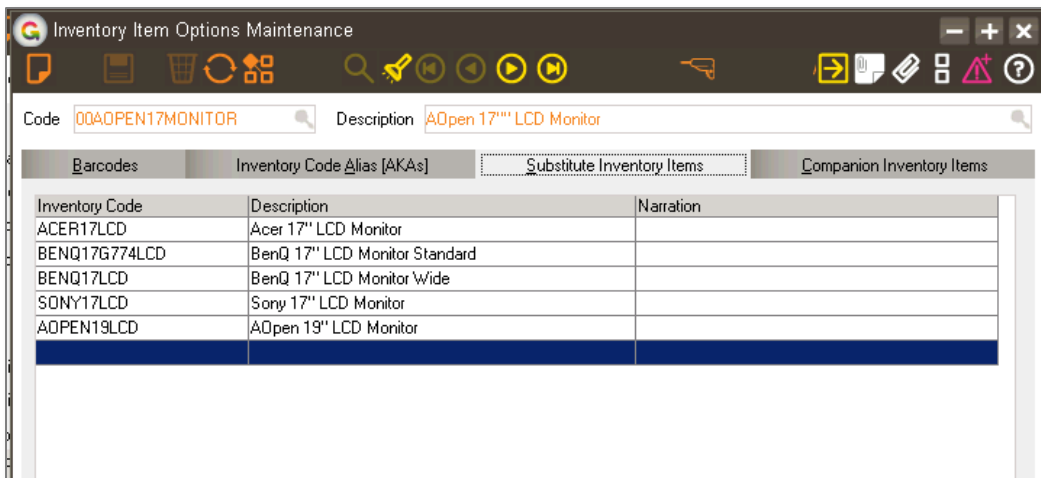
OTHER GREENTREE CONFIGURATION

INVENTORY ITEM SETUP

Use the following process to define the Substitute Items for each Inventory Item.
1. Select the menu item | Data Entry | Inventory | Inventory Item Maintenance |

2. Select the Inventory Item you want to define Substitute Items for.
3. Click on the Options button

4. Click on the Substitute Inventory Items tab
5. Enter the code for each substitute product, all standard Greentree searching options are available
6. Click Save