VERSION 1.0 AUGUST 16, 2018

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

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								La	st Order N	umber		5002	:43
	Sales O	Irder			Line Item		De	livery Deta	iils			Custom	
Line # 1	Go	<u>R</u> e-numl	ber Line T	_{ype} Inv	entory 🔍 T	ах Туре	Inclusive	Tax Co	ode NZ G	ST	🔍 Status	Entered	2
Inventory II Code	tem 00AOPE	N17MOM	C Des	a AOpe	n 17'''' LCD Monit	or		< <u>i</u> s t	ran Type	Issue	۹,	Price History	
Location	01		V UON	1 EA	Price Bk	RETAIL	- R			Sal	es <u>H</u> istory	Stock Status	
Data Qty		0.0000	Disc%		0.00 Hold	Tax%	: 15.00	Line T	otal		0.00	S <u>a</u> ve Line	
Price		0.0000	Hold	Disc	0.00	Tax	0.00	Deliver	yDate 2	4/1/	2013	Cancel Line	
Narration												Kitset	
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												PO <u>L</u> ink	
Discount		0.00 9	Surcharge		0.00 Net		0.00 Tax	0.00	Total		0.00		
No. Typ	be Accou	int/Code	Descri	otion	Location	n UOM	1 Price Book	Quantity	F	Price	DelivDate	Total	Narration
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Editing a	n existing	Sales O	rder				Sales (Order 226 o	of 246				

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.

Customer 1005 Wagin Secondary Stock Item 00AOPEN17M0NITC AOpen 17"" LCD Monitor Unit Of Measure EA Apply	
Stock Item 00A0PEN17M0NITC A0pen 17"" LCD Monitor Unit 0f Measure EA Location 01	
Unit Of Measure EA Location 01 Cloc	
Location 01 V	
	se
Item Code Item Description Unit Price Available On-Hand On-Order Backorder	Fwd-Order
00A0PEN17M0NIT A0pen 17"" LCD Monitor 269.10 59 75 1 5	0
ACER17LCD Acer 17" LCD Monitor 690.00 0 0 0 0	0
BENQ17G774LCD BenQ 17" LCD Monitor Standard 450.86 0 0 0 0	0
BENQ17LCD BenQ 17" LCD Monitor Wide 595.13 10 10 0 0 0	0
SONY17LCD Sony 17" LCD Monitor 2148.83	
AOPEN10LCD A0 non 10"LCD Marries CC1 25 0 0 0 0	0

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

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							Last Order	r Number		5002	43
	Sales Order			Line Item		De	ivery Details			Custom	
.ine # 1	<u>G</u> o <u>R</u> e-nun	nber Line T	ype Inv	entory 🔍 T	ax Type li	nclusive	Tax Code NZ	GST 🤇	🔪 Status	Entered	2
Inventory Ite Code E	em BENQ17LCD	S Des	c BenQ	17'' LCD Monitor	Wide		LS Tran Typ	be Issue	٩,	Price History	
Location (01	V UON	1 EA	Price Bk	RETAIL	۹.		Sale	s <u>H</u> istory	Stock Status	
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Price	0.0000	Hold	Disc	0.00	Tax	0.00	Delivery Date	24/1/2	2013	Cancel Line	
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Qty BO	0.0000	BO Pri	iority	Priority 5		T				Substitute Item	s
Cost	0.0000	Hold	GP%	0.0000	GP	0.0000	GP for Line				
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Discount	0.00	Surcharge		0.00 Net	0).00 Tax	0.00 Total		0.00		
No. Type 1 IN	e Account/Cod BENQ17LCD	e Descri BenQ	ption 17'' LCD	Location Monitor \ 01	EA	Price Book RETAIL	Quantity 0.0000	Price [0.0000 2	DelivDate 4/1/2013	Total I 0.00	Narration

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

Ġ Sales Entr	y (User: SUF	PER - Workstatior	: GT03)					- + x
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Entry type	Sales	•			Last r	reference		
		Doc <u>k</u> et				<u>N</u> otes		
Docket number		•		Date	24 / 1 / 2013	3 🚃		
Customer	1019	CASHSA	🔍 Cash Sales			<u>_</u>		
Salesperson	SAMF Stev	e Sampson 🛛 🔍	Price level TRADE	Trade			Discount %	0.00
Inventory item	า	Description		Quantity	Price		Total	Ontions
00AOPEN17	MONITOR	AOpen 17"" LCE	Monitor	1.00	655.5100	6	555.51	Options
								<u>A</u> dd line
								Re <u>m</u> ove line
								S <u>e</u> rial / Lot
								Last line
								Substitute Items
	Transaction	s	<u>R</u> e	ceipts		Ag	<u>d</u> ditional lin <mark>e de</mark>	tedi
Di	scount	Total ex-tax	Tax		Sale total	Amount ter	ndered	Change
	0.00	570.01	85.50		655.51		0.00	0.00
Adding a new	Sale			There are	no Sales			

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

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

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Enter N	ew Registration Coc	le		Install App		Delete Inactive/Expired Apps	<u>U</u> nin:	stall App	s For Greentree
Code	Name				Descri	ption		Active	Expiry Date 🔺
000000	Apps For Greentre	e Form			App U	sage information on Forms		•	31 December 2
010001	AR Sales Orders T	ab			Tab in	Customer maintenance to display Sal	les Ord	•	03 December 2
010002	IN Reorder Workb	ench			Invent	ory Reorder Workbench		I	31 December 2
010003	IN Min/Max Workt	bench			Invent	ory Min/Max Workbench		V	31 December 2
010004	AR Sales History T	ab			Tab in	Customer maintenance to display Sal	les Hisl	•	31 December 2
010005	AR Pricipa Tab				T ah in	Customer maintenance to display Priv	nina		31 December 2

- 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 |

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Code 00A0PEN1	7MONITOR	Cescription	AOpen 17'''' Li	CD Monitor		< <u></u> [S	Sa <u>v</u> e details
Main	Defaults	Transactions	Custom	Notes	Related	Analysis	Costing
Analysis code Decimal item unit	MONITO O Decimal Places	K MONITOR	v	On-hand quantitie On-hand Committed to sal	s les orders	286 110	Pricing Unit of measure
Job activity code	STOCK (Stock)		Ŧ	Picked Qty		0	Reorder details
Туре	Not Serial/Lot Ite	m	V	Committed to fac Committed to rec Protected	ary story orders quisitions	110 4 0 24	Supplier details Te <u>x</u> t
Kitsets exist Unit weight 0 Unit volume 0 Stocking unit E Stocktake details Cycle Monthly Location 01 02 03.Z01 03.Z02	.0000 .0000 A Next Stocktake 19/5/2004	Non diminis Indent Item Allow negat Allow negat Stock ranking No Date Stocktake in P	hing hiy details ive available gative on-hand here Progress 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Available On-order On-requisition On-shipment In-production Backorders POs Allocated to Forward orders Balance Period balance Date histor	o Jobs ces Deg y Loca	24 148 45 8 0 0 34 0 0 167 <u>m</u> and history tion balances	Options Kitsets Warranty Bill of materials Create adjustment Create multi adjustment Create gurchase order Create factory order QC tests
Status Active				Substitutes exist			

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

G Inventory Item Options	Maintenance		- + x
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Code 00AOPEN17MONITOR	Description AOpen 17" LCD Monitor		0,
arcodes In	nventory Code <u>A</u> lias (AKAs) <u>Substitute Inv</u>	entory Items	Companion Inventory Items
Inventory Code	Description	Narration	
ACER17LCD	Acer 17'' LCD Monitor		
BENQ17G774LCD	BenQ 17'' LCD Monitor Standard		
BENQ17LCD	BenQ 17'' LCD Monitor Wide		
SONY17LCD	Sony 17" LCD Monitor		
AOPEN19LCD	A0pen 19'' LCD Monitor		
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- 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