

VERSION 1.0

MAY 7, 2019

Apps for Greentree

A&A HELPER

APP NUMBER: 010043

Powered by:

MYOB Greentree

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FEATURES

1. The A&A helper app addition allows you to add extra information against any specified class.

Because the App can be made available by User, this means you can control who can access the data, meaning that there is much greater control than using a UDF.

2. The A&A helper app overrides the default behavior of A&A script editor windows making them non-modal so that the script windows do not need to be closed to access other Greentree functions, including being able to Run scripts. There is a new “Save” button and the “OK” button not performs a “Save & Exit”. This saves time when developing scripts.

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.
- Access is able to be set by Company and User.
- The Class drop-down is limited to those classes set up in Rule Class Maintenance.
- The extra attributes can be loaded on transactional type of classes, so really covers both UDF and transaction UDF situation.
- Note - Transaction UDFs are more suitable for transaction type of things (user facing), with the A&A Helper attributes used for security settings.

OTHER REQUIREMENTS

Greentree Modules: Any.

Associated Apps:

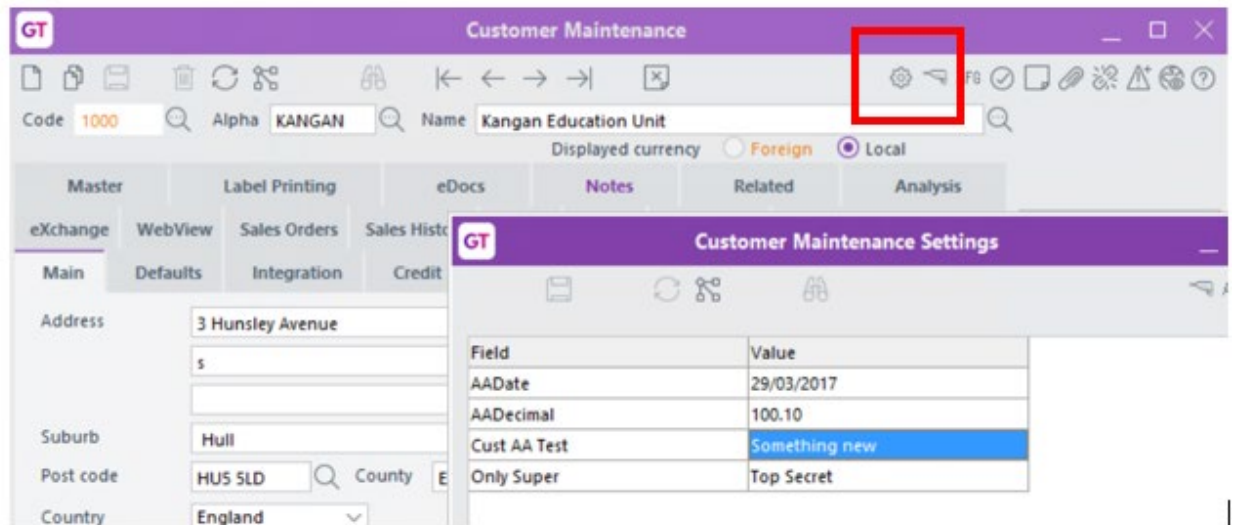
Optional - 010040 - Audit Logging – can track changes to A&A Helper attributes.

USER INSTRUCTIONS

WORKED EXAMPLE

This example is for a Customer, logged on as Super.

1. Follow the app configuration steps to allow maintenance of addition fields of the Customer class
2. Select the menu item | [Data Entry](#) | [Accounts Receivable](#) | [Customer Maintenance](#) |
3. Extra data accessed via cog icon.



4. The fields able to be edited are dependent on the logged in user's settings.

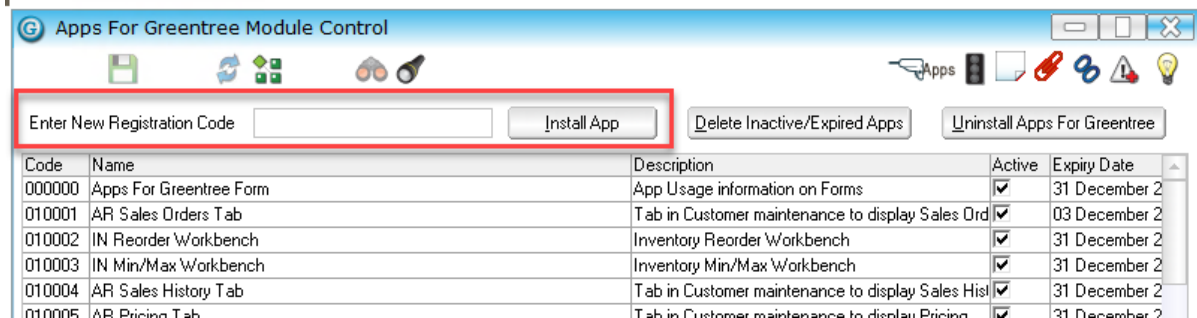
- None – data is not visible
- View – View only, no edit
- Edit – Edit mode available

IMPLEMENTATION GUIDE

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

APP INSTALLATION

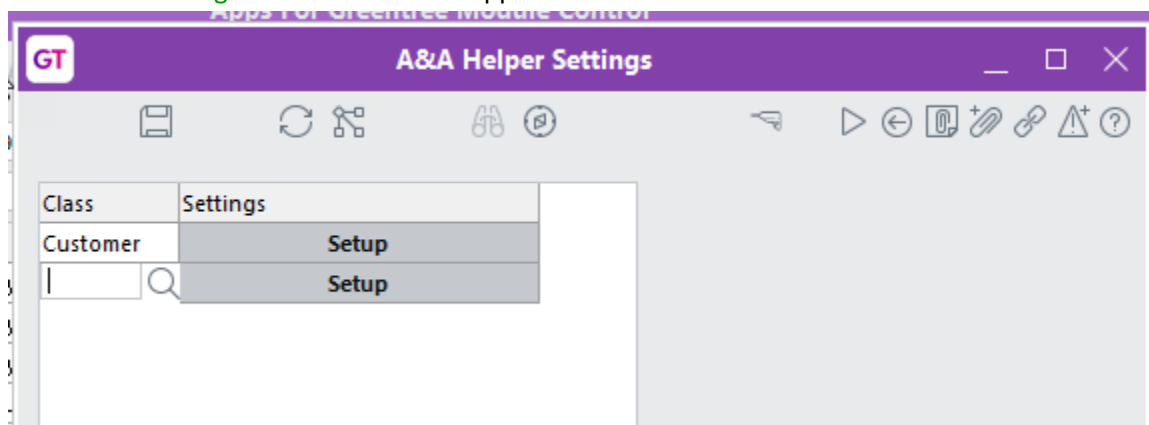
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



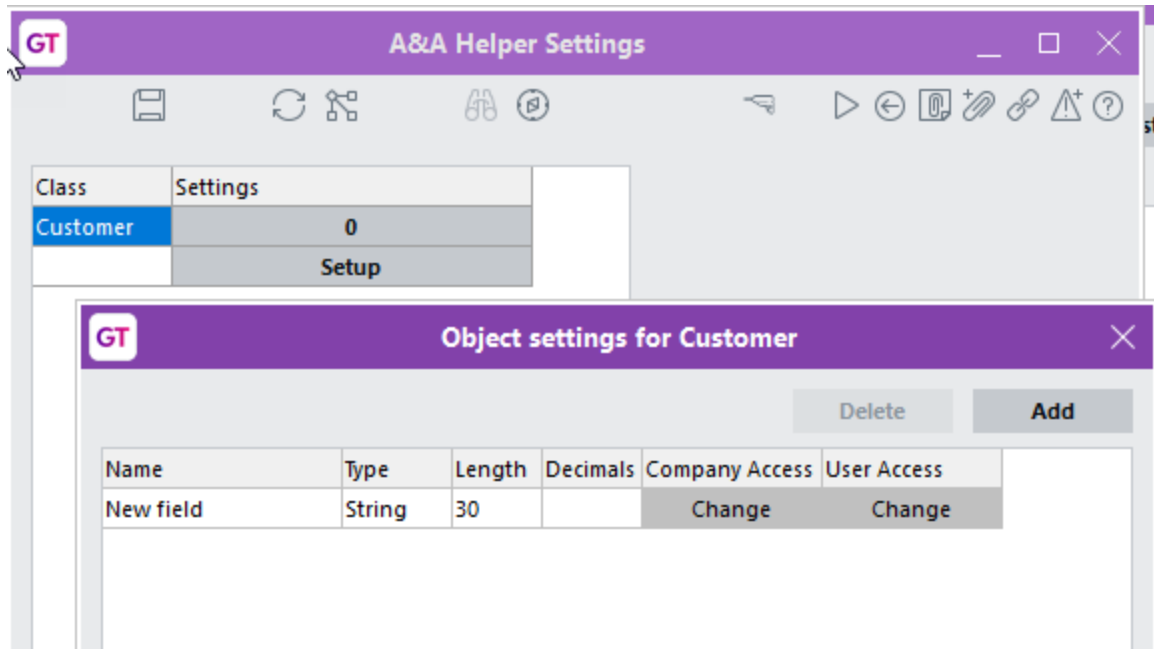
4. Select/Highlight the A&A Helper App.
5. Click on the Edit Users button and select the users who will be configured to use the A&A Helper app, for which companies.
6. Save and Close the form.

APP CONFIGURATION

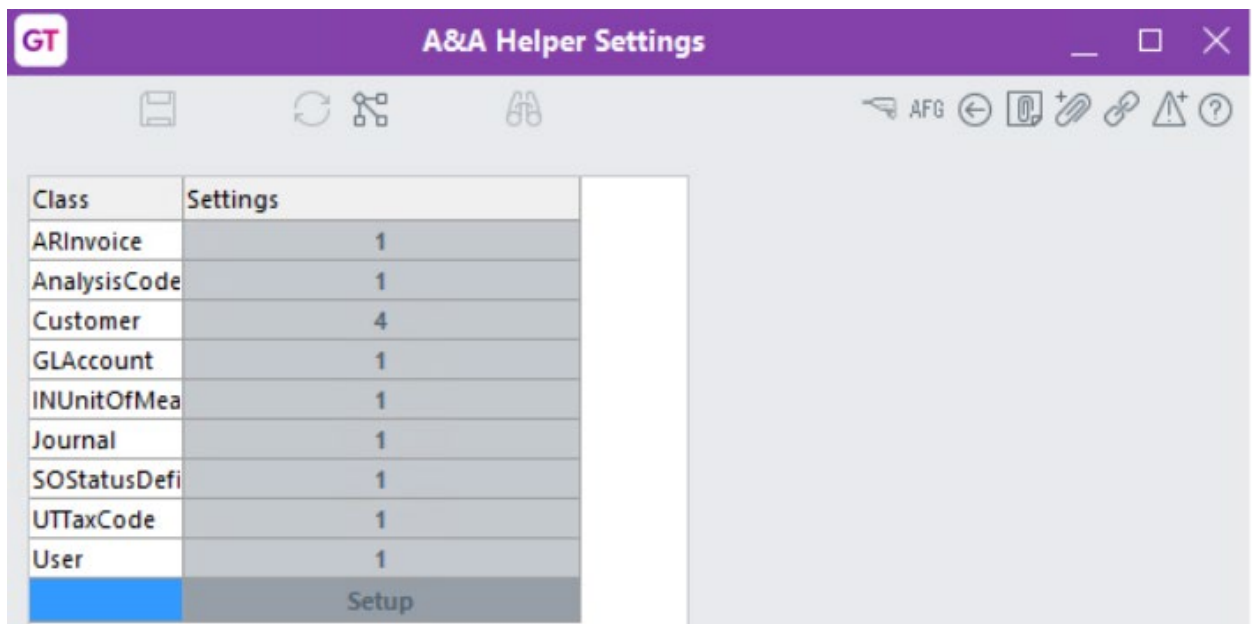
1. Click on the Change button beside the App



2. Select the Class Name for each class you would like to configure.
3. Click the Setup button beside the class, to add properties.

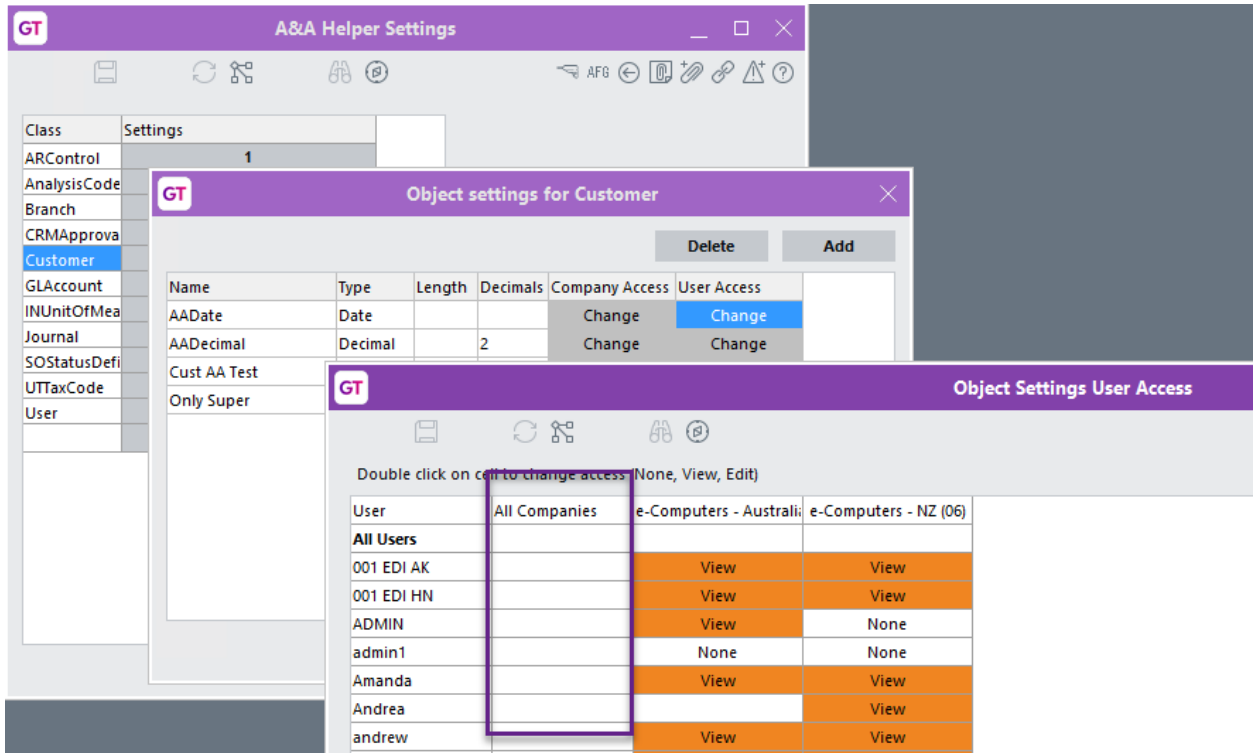


4. Type in a name for the field and specify its type, length and format.
5. Click Done when all fields have been added.



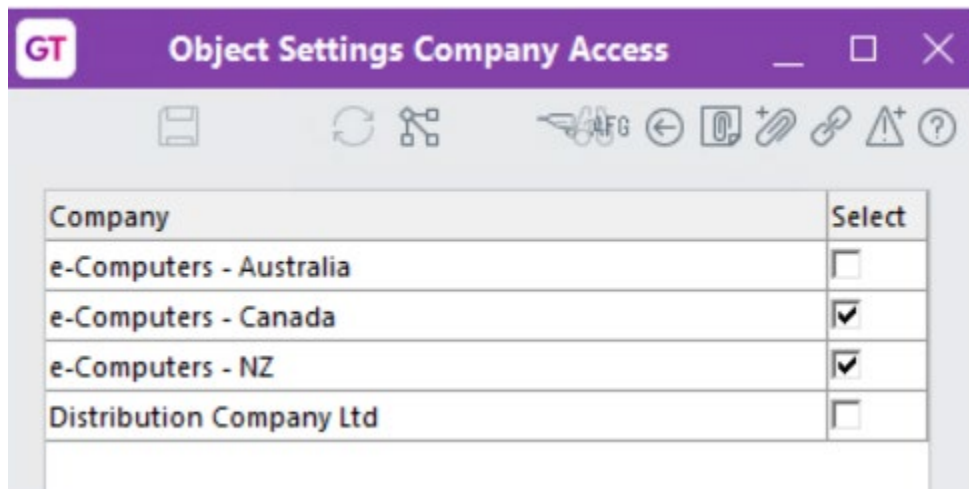
Once properties have been added, the Settings column will hold the number of properties defined.

6. Once fields have been created, the Company and User Access can be set up.



- Access can be restricted by Company and User, by using the checkboxes. However note that overriding access is governed by the App Installation access to Companies and Users – i.e. the screens below only offer Companies enabled in the App User Access.
- In the case of Users, the top row can be used to select/deselect all users.
- The first column can be used to set for a user for all companies they have access to
- Whether on All Users, or individual users, a double click will change the setting from None>>View>>Edit

Change Company Access



Change User Access – further limited to Company selections

GT Object Settings User Access		
Double click on cell to change access (None, View, Edit)		
User	e-Computers - Canada	e-Computers - NZ (06)
HR Monthly		
HR Weekly		
KEITH		None
mauritz	None	None
Nicola	None	None
PEPi	None	None
SALES	None	
Sally		None
sam	None	None
sam2	None	
Sandra Sandston		None
simon		None
Steve Simpson	None	None
SUPER	View	Edit

7. **Save** the settings, using the save (disk) icon in the header and **Close** the window.

A&A Helper attributes are now also available with the Audit App 010040.