

VERSION 1.0
AUGUST 16, 2018

Apps for Greentree

INVENTORY CUSTOMER ALIAS CODES

APP NUMBER: 010059

Powered by:

MYOB Greentree



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FEATURES

1. Use of alias codes for inventory, specific to customers.

This app lets you set up an Alias Code for each Inventory Item, for each customer. and to configure custom invoices and packing slips to show your customer's codes in place of your own.

The App adds a new tab on the Inventory Item Options Maintenance screen called Customer Alias. This Tab is used to set up Stock Code Aliases per Customer.

Two new fields **aliasName** and **aliasNarration** are added to the collections **VINARLineItem** and **SOPSINLineItem**. These can be used to include the customer's alias code on packing slips and invoices via report customisation.

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

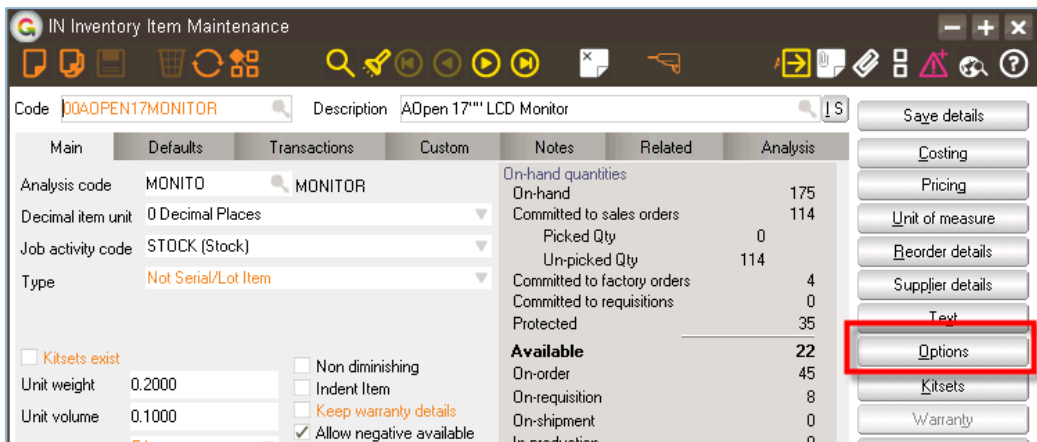
Greentree Modules: Inventory, Sales Orders

Associated Apps: None.

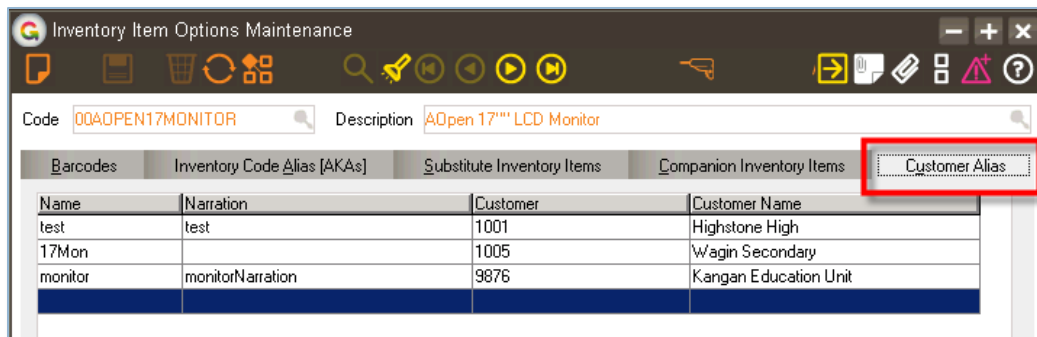
USER INSTRUCTIONS

SET UP ALIAS CODES

1. Select the menu item | **Data Entry** | **Inventory** | **Inventory Item Maintenance** |
2. Select the stock item your customer has an alias code for in the usual manner using arrow keys, entering a Code, Name, or using the Advanced Search
3. Click on the **Options** button



4. Then click on the **Customer Alias** tab



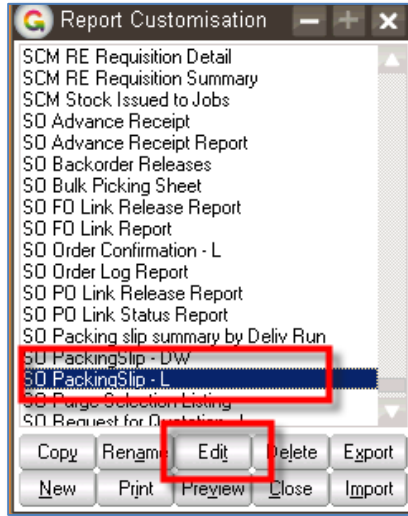
5. Setup the alias codes as required

- Name** Type the customers code for this item
- Narration** type the description the customer knows this product as
- Customer** Select the customer from the drop-down list – the customer name will be displayed

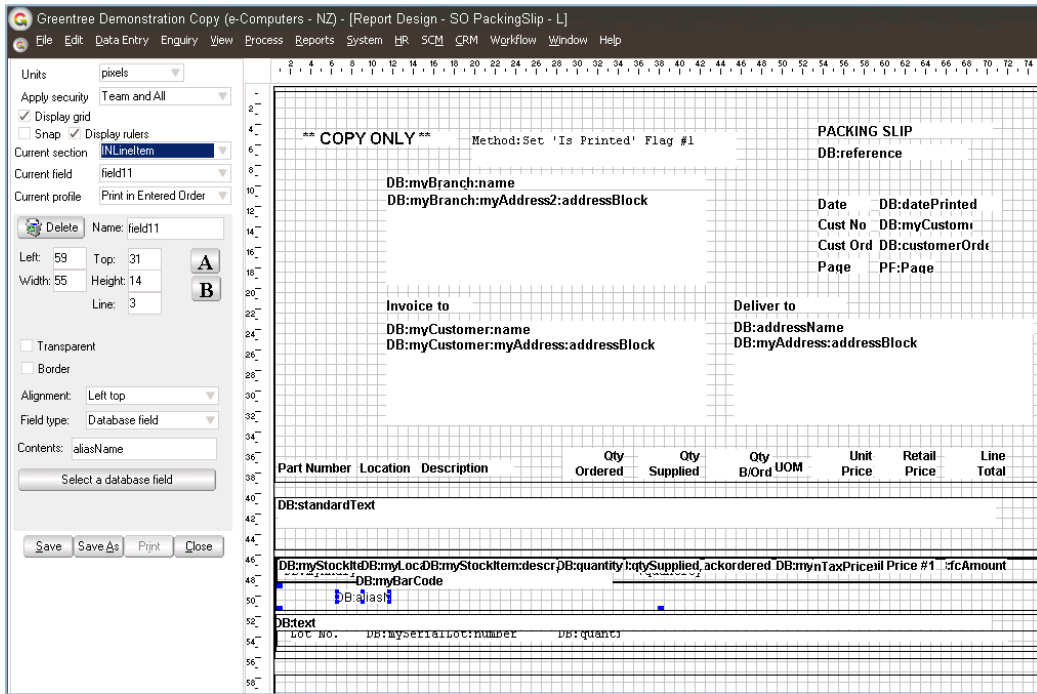
You can add as many customer alias codes per product as required.

ADD ALIAS CODE TO REPORTS

1. Select the menu item | System | Customisation | Report |
2. Select the report required and click Edit



3. In the INLineItem section, you can add a database field called aliasName or aliasNarration – these match to the fields saved above.



4. When you print the report the added field will be printed

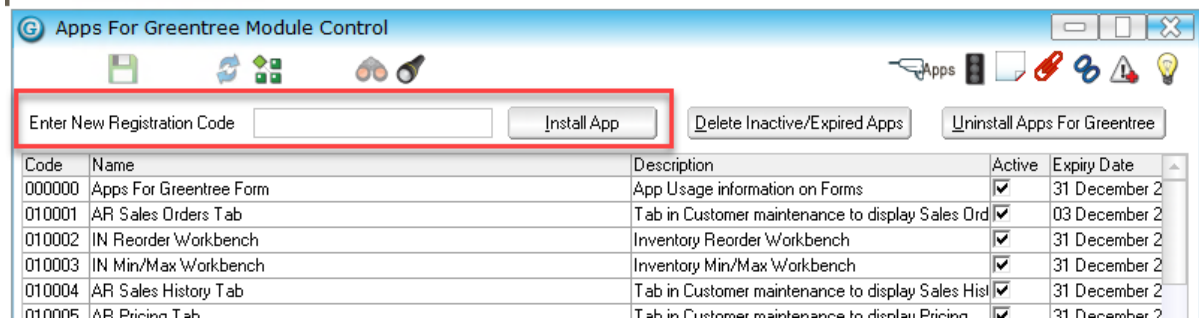
Invoice to			Deliver to					
Waiqin Secondary 5 Tankerville Road RD 2 Hoon Hay Christchurch 8002			Waiqin Secondary 5 Tankerville Road RD 2 Hoon Hay Christchurch 8002					
Part Number	Location	Description	Qty Ordered	Qty Supplied	Qty B/Ord	Unit Price	Retail Price	Line Total
00AOPEN17M0	02	AOpen 17" LCD	1.0000	1.0000	0.0000	234.00	159.98	234.00
	4234							
	17Mon							
01AOPEN17M0	02	AOpen Dual Core	1.0000	1.0000	0.0000	2,000.00	443.91	2,000.00
	114437							
	OpenDC							
01MSI845MAX201		MSI Dual Core Desktop	1.0000	1.0000	0.0000	578.11	673.45	578.11
	115599							
	MSIDC							

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
000000	Apps For Greentree Form	App Usage information on Forms	✓	31 December 2
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	✓	03 December 2
010002	IN Reorder Workbench	Inventory Reorder Workbench	✓	31 December 2
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	✓	31 December 2
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales Hist	✓	31 December 2
010005	AR Pricing Tab	Tab in Customer maintenance to display Pricing	✓	31 December 2

4. Select/Highlight the Inventory Customer Alias Codes App.
5. Click on the Edit Users button and select the users who will be configured to use Inventory customer alias codes, for which companies.
6. Save and Close the form.