

VERSION 1.0  
JUNE 17, 2019

# Apps for Greentree

## EMAIL ATTACHMENT PROCESS

APP NUMBER: 010071

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. Email attachment process.

This app provides functionality to read emails and extract attachments according to predefined rules, and provides the class definition for A&A rules to be able to then process them as required.

A&A rules are not provided as part of the app.

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### 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.

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### OTHER REQUIREMENTS

**Greentree Modules:** None.

**Associated Apps:** None.

## USER INSTRUCTIONS

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### PROCESS MAILBOXES

#### DEFINING MASKS AND FOLDERS

The mailboxes are set up within the app configuration. You must have valid account details to access a pop3 mail box. If using outlook.office365.com ensure you can log onto the mail box using your browser to ensure you have correct account details.

For each mailbox, attachment file name masks can be specified.

Optionally an export directory to save attachments can be specified. If not specified, the attachment is accessible through a script as a Greentree attachment.

A Run Command can be specified in the App Configuration, eg third party PDF Scaping Apps which can convert incoming PDF files to text files for further processing.

All defined mailboxes are polled when the system script is run, and all attachments meeting the criteria defined in Email Attachment Processors will be extracted.

Note – all emails from the mailbox will be taken. Emails which do not contain an attachment with the specified file mask (see below) will not be retained.

#### SYSTEM SCRIPT - EMAIL ATTACHMENT PROCESSING

The system script is located under Utilities, System Scripts, Apps4GT General.

Running the script reads mailboxes, extracts attached files according to masks, runs a command line if defined, and lastly triggers a programmatic event for VAppsEmailAttachment.

The run command you could have a dos command run against the file before firing the rule, for example to copy it somewhere else or run a process like extracting values from a pdf etc.

When the run command is created, the actual file name is then inserted as a replacement for {filename}.

The filename is the full path filename ie including folder.

#### FURTHER ATTACHMENT PROCESSING

When the App is installed, VAppsEmailAttachment is added as a valid class for A&A rules, so can be used for further processing of received attachments. Rules using this class using the programmatic event "Email Attachment Processed" will run when the script finds an attachment.

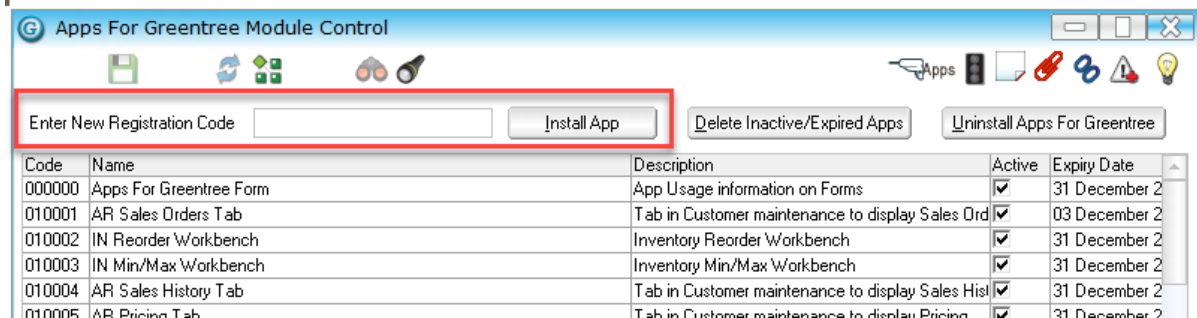
The rule script would then find attachments in the known export directory or attached to the VAppsEmailAttachment record (all Attachments) and process the file as required. Your Greentree Partner can assist with processing scripts.

## 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 **Email Attachment Process** App.
5. Click on the **Edit Users** button and select the users who will be configured to use the App and for which companies. On Users that will run the script require access.
6. **Save** and **Close** the form.

### OTHER GREENTREE CONFIGURATION

Complete the following set-up in Greentree before configuring the App.

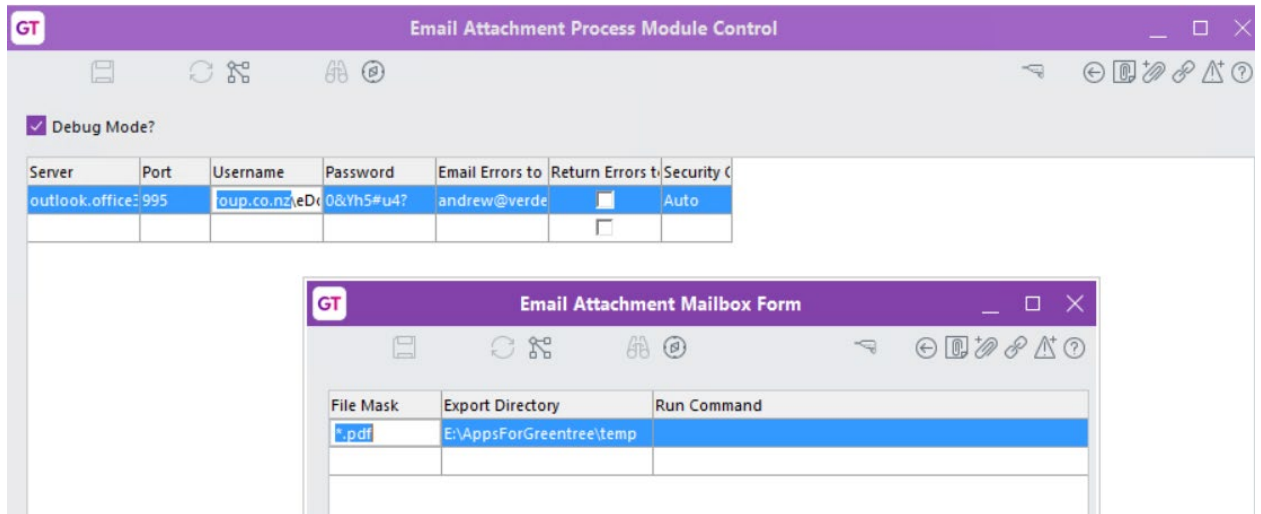
None.

### APP CONFIGURATION

1. Select/Highlight the **Email Attachment Process** App.
2. Click on the **Change** button

Configure mailboxes to be read for emails and attachments.

Drill (double click) on the return errors field (next to the box) get to the popup screen, where any filters to apply can be configured.



- Server** Enter email application.
- Port** Enter port number to use.
- Username** Enter username for email account.
- Password** Enter password for email account.
- Email Errors to** Enter an email address where any errors can be sent to.
- Return Errors to Send** Tick to have a return message sent to sender if an error is encountered.
- Security** Use the dropdown to select security option.

Debug mode can be enabled to get screen output as the script runs.

The Email Attachment Mailbox Form is where filters for attachments can be set up.

- Mask** Set up mask for attachment files. Several may be created for the one mailbox.
- Export Directory** Enter a location to save attachments to. If not displayed right click on field headings to add this column.
- Run Command** Optionally enter a command line string eg you could have a dos command run against the file for example to copy it somewhere else or run a process like extracting values from a pdf

The run command should have a token for the file name ie "{filename}".  
When the run command is created, the actual file name is then inserted.

