VERSION 2.0

JUNE 20, 2017

Apps for
Greentree

CRM ORGANISATION QUOTES

APP NUMBER: 010074

Powered by:

MYOB Greentree

TABLE OF CONTENTS

FEATURES

1. **This App allows printing multiple quotes on one document for a CRM Organisation.**

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.

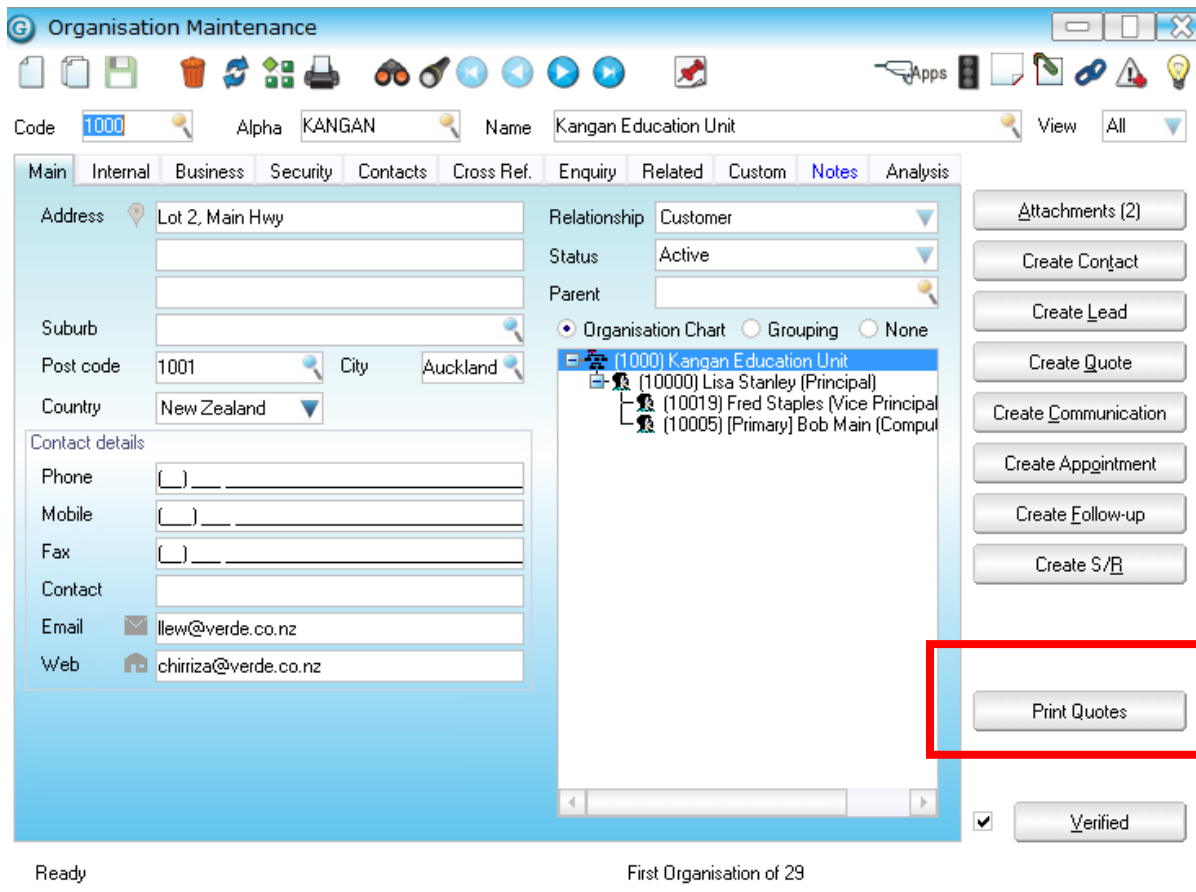## OTHER REQUIREMENTS

Greentree Modules: CRM Basics, CRM Sales

Associated Apps:

ORGANISATION MAINTENANCE

| CRM | Relationships | Organisations
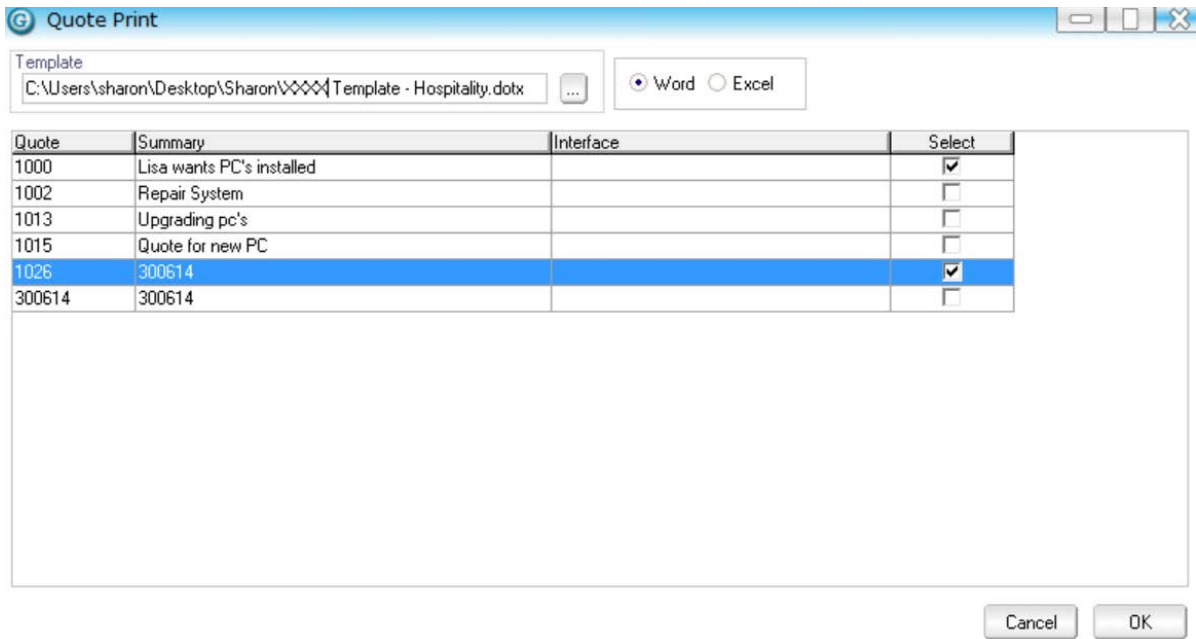
This App enables the Print Quotes button.

CLICK PRINT QUOTES BUTTON

The pop-up screen shows available quotes, and allows selection of a Word or Excel template to use.

The specified Template must be a valid template file.

Printing of quotes using templates is standard Greentree. This App just allows quotes to be combined into a single document.

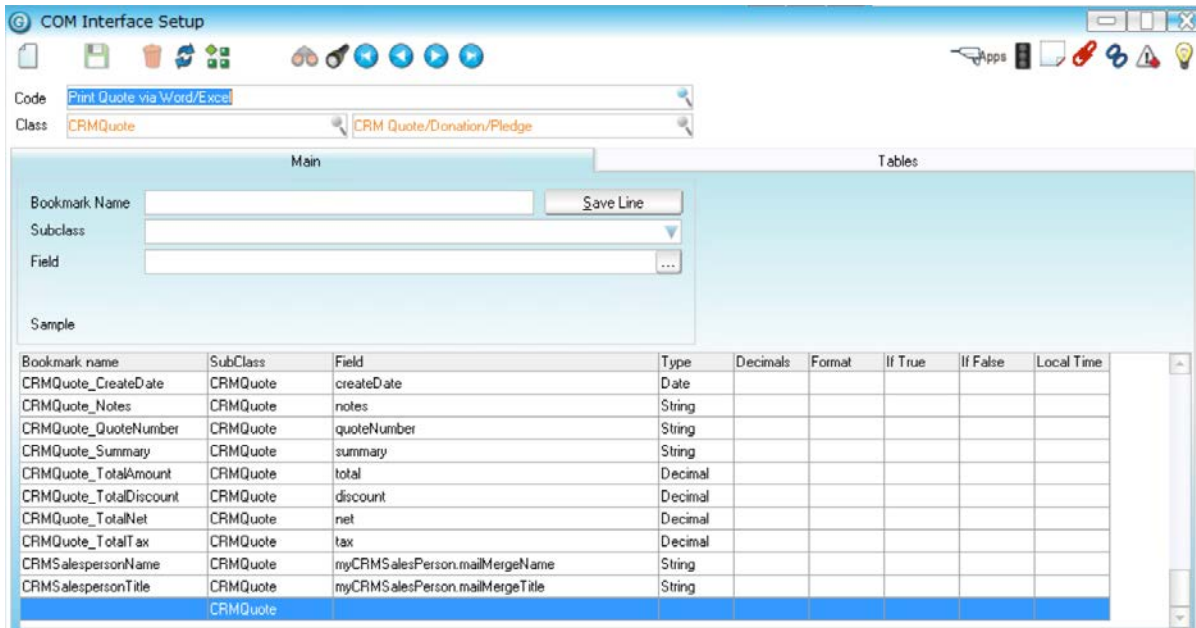Browse for template, click required quotes to include and then OK.

TEMPLATE DEFINITION

Use of templates is standard Greentree functionality and creation of these is documented within standard Help.

| CRM | System | Setup

Go to the Templates tab

| CRM | System | Utilities | COM Interface Definition

This is where you specify what fields are available for use within the templates.

For example, part of a template might look like this, with the relevant data embedded at runtime:

Template can contain website hyperlinks, logos and images.
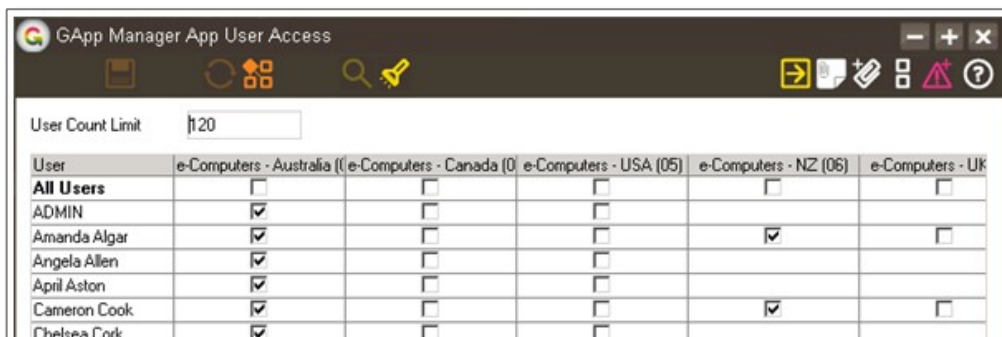
IMPLEMENTATION GUIDE

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 CRM Organisation Quotes App.

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.

GREENTREE CONFIGURATION

Not required for this App.

APP CONFIGURATION

A suitable template file will need to be developed to use with this App.