

VERSION 2.0  
JUNE 20, 2017

# Apps for Greentree

## CRM ORGANISATION QUOTES

APP NUMBER: 010074

Powered by:

**MYOB** Greentree

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## FEATURES

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

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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:** CRM Basics, CRM Sales

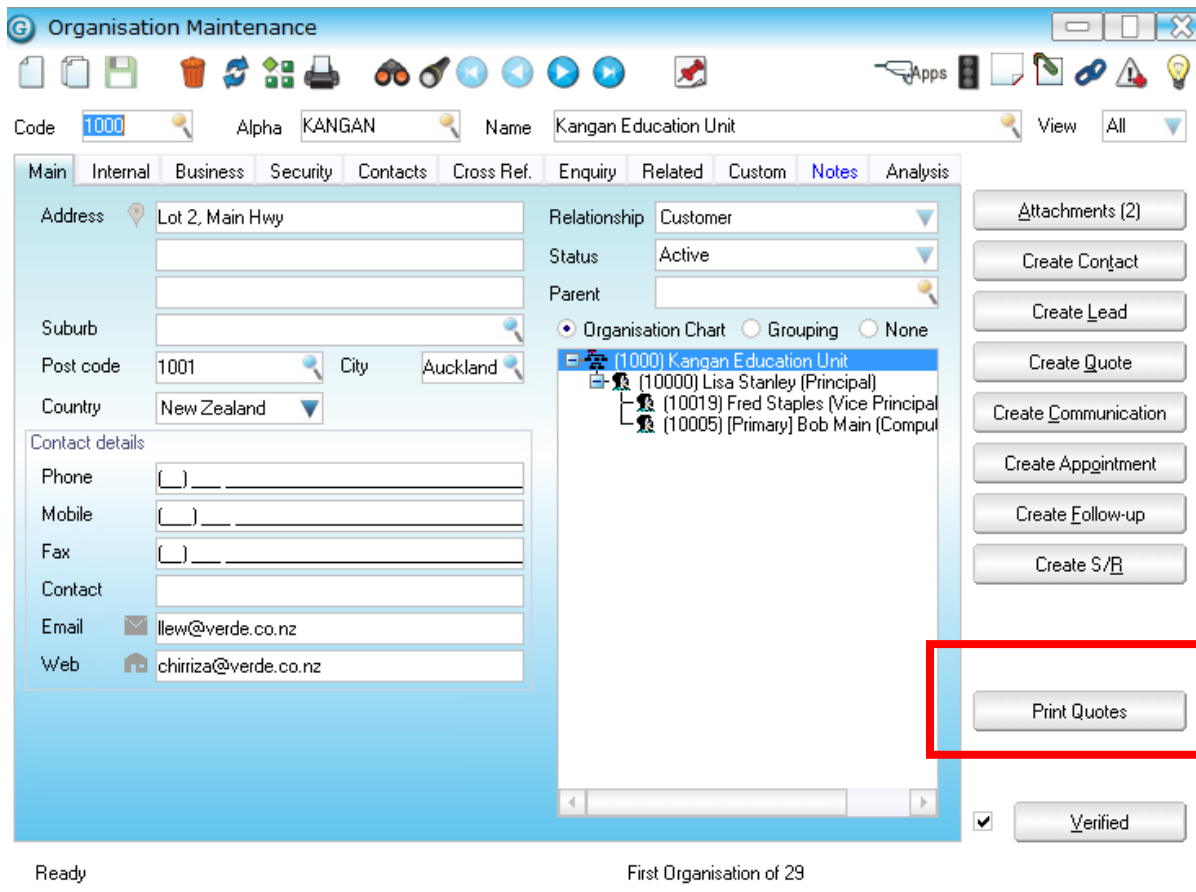
**Associated Apps:**

## USER INSTRUCTIONS

### ORGANISATION MAINTENANCE

| CRM | Relationships | Organisations

This App enables the Print Quotes button.



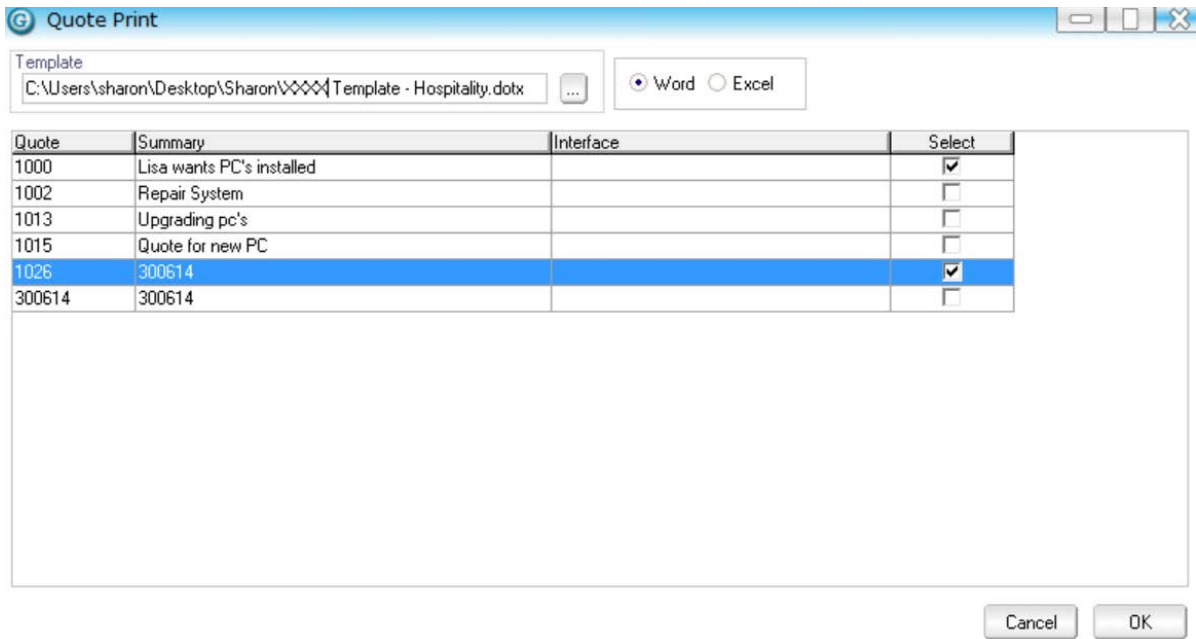
### CLICK PRINT QUOTES BUTTON

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

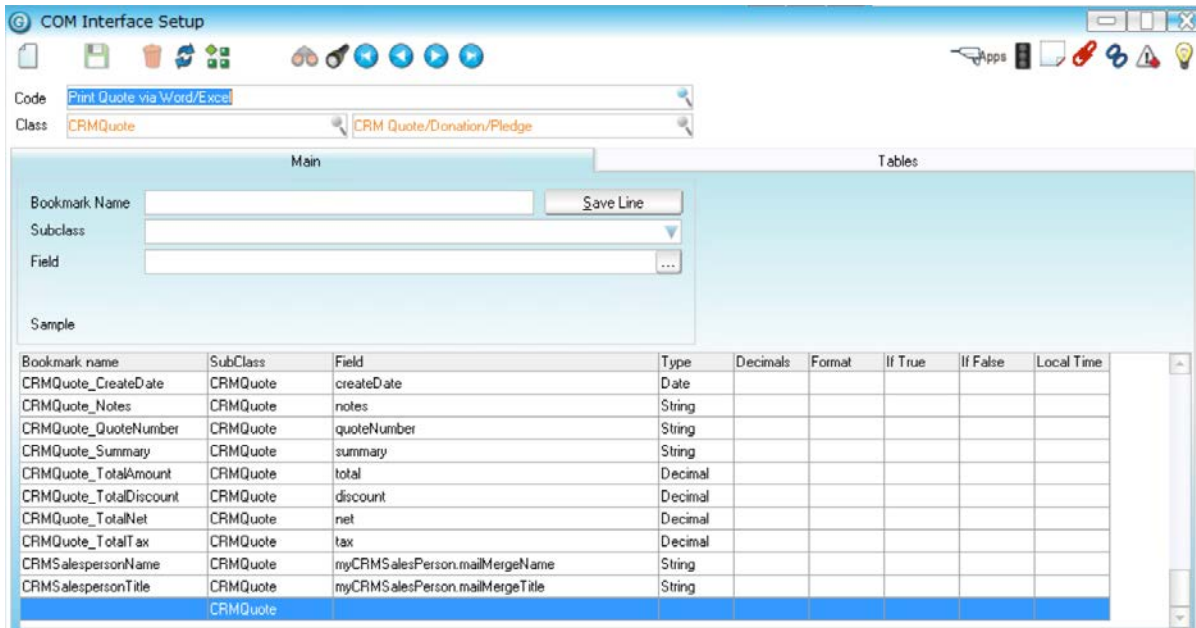
Use of templates is standard Greentree functionality and creation of these is documented within standard Help.

[| 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:

<p><u>CRMOrganisation_Name_Proposal</u></p> <p>Dear <u>CRMQuoteContact</u>,</p> <p>Harum aute cum ipsandunt, sunt modi aute mod ut aut fuga, Met aut audis mos exenior estiunti optaeptur a sed eseno perati umquis ilicitatem fuga. Pient, sant exerciet fuga, Nam volorro tet landell orporib erioria volut voloratum num eium quisque et rem recto il eum essit des et, sinus int aut ommoluptatur apel inctet abo. Ebitis moluptat.</p> <p>Ajkfaiofufawioeruhjawogfhaoiqwur9qwtujjgg</p> <p>We would like to recommend the following option for your consideration.</p>	<table border="1"> <tr> <td>Date</td> <td><u>CRMQuote_CreateDate</u></td> </tr> <tr> <td>Company</td> <td><u>CRMOrganisation_Name</u></td> </tr> <tr> <td>Address</td> <td><u>CRMOrganisation_Postal Address1</u></td> </tr> <tr> <td></td> <td><u>CRMOrganisation_Postal Address2</u></td> </tr> <tr> <td></td> <td><u>CRMOrganisation_Postal Address3</u></td> </tr> <tr> <td>Quote Number</td> <td><u>CRMQuote_QuoteNumber</u></td> </tr> <tr> <td colspan="2"><i>Quote valid for 30 days</i></td> </tr> </table>	Date	<u>CRMQuote_CreateDate</u>	Company	<u>CRMOrganisation_Name</u>	Address	<u>CRMOrganisation_Postal Address1</u>		<u>CRMOrganisation_Postal Address2</u>		<u>CRMOrganisation_Postal Address3</u>	Quote Number	<u>CRMQuote_QuoteNumber</u>	<i>Quote valid for 30 days</i>	
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	<u>CRMOrganisation_Postal Address3</u>														
Quote Number	<u>CRMQuote_QuoteNumber</u>														
<i>Quote valid for 30 days</i>															

Template can contain website hyperlinks, logos and images.

## IMPLEMENTATION GUIDE

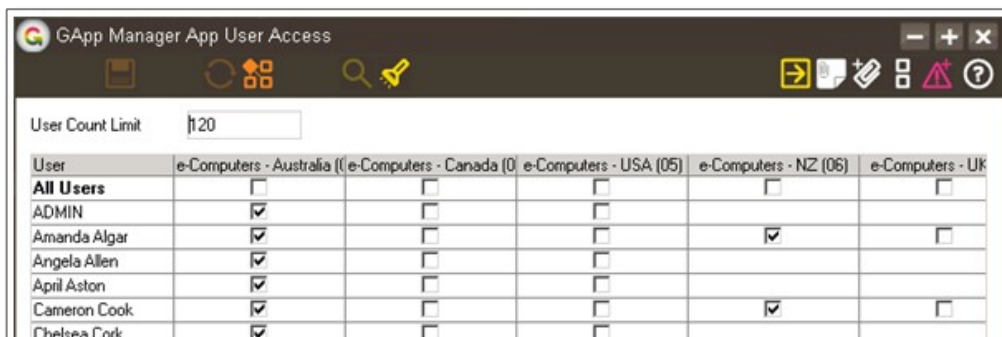
Please refer to the Important Notes section above before installing and configuring this App

### 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 **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.

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## **GREENTREE CONFIGURATION**

Not required for this App.

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## **APP CONFIGURATION**

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