Apps for Greentree

BULK ARCHIVING OF INVENTORY ITEMS

APP NUMBER: 010081

Powered by:

MYOB Greentree

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FEATURES

1. **Bulk Archiving**

   Inventory items can be individually archived via a tick box in IN Inventory Item Maintenance. This app provides a way to bulk archive Inventory item, using a pre-selection process to check before processing.

   Item selection done by Analysis Code (or all) and Status selection and the list can be pre-filtered to only those items able to be archived.

   Final selection of items to be archived is done in a table, using a check-box or Select All button. Archive button must be clicked to process.

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.
- There is no Bulk Unarchive. Individual items can be unarchived using standard functionality (one by one).

OTHER REQUIREMENTS
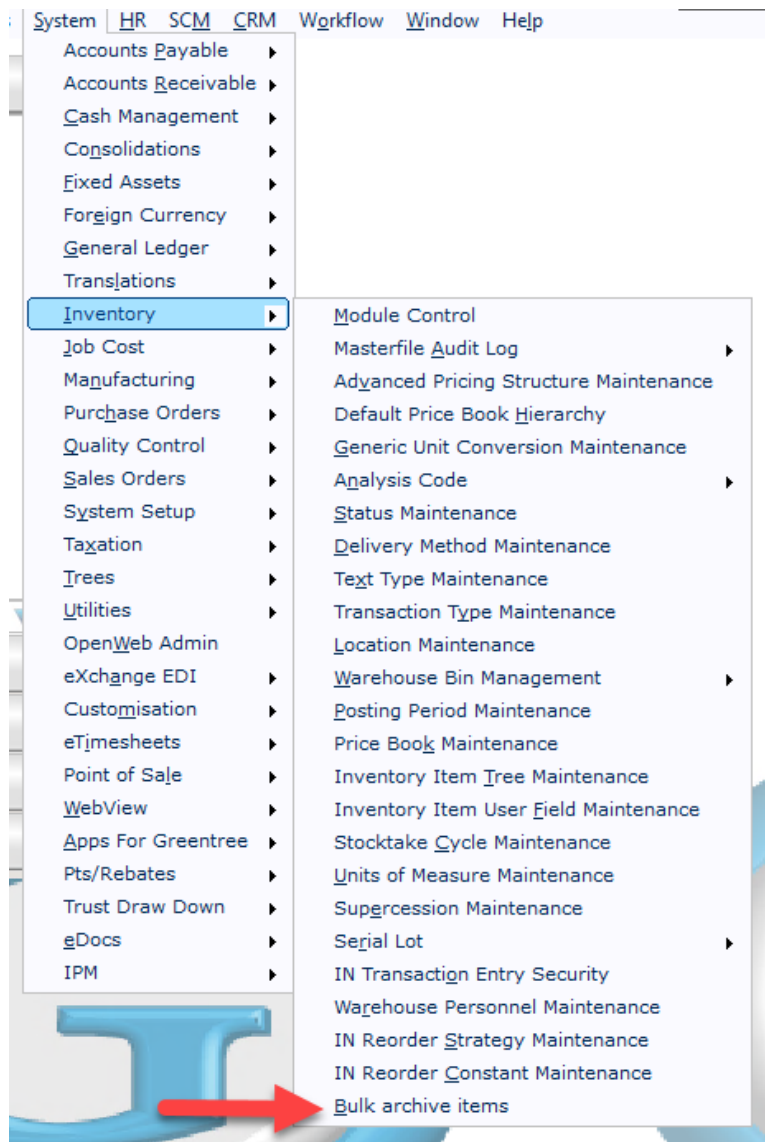
Greentree Modules: Inventory

Associated Apps: None
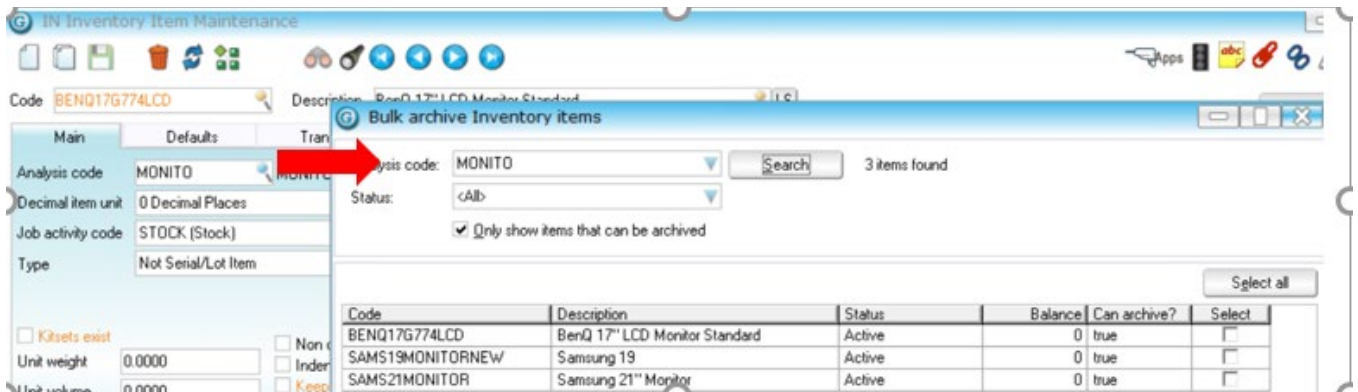
BULK ARCHIVE

Multiple items can be bulk archived based on their Analysis Code and/or Status. These might be assigned over time, to tag them for bulk archiving.

Use the following process to Bulk Archive Inventory Items:

1. Select the menu option System | Inventory | Bulk Archive items

2. Enter Analysis Code if required

3. Select Status code if required.
4. Tick Only show items that can be archived to pre-filter the list to only those items with zero balance, no outstanding transactions etc.
5. Click Search.
6. Review the list of items displayed and use Select All, or individually Select which items are to be archived.
7. It is not possible to select any items for archiving if Can Archive? Is false. The reasons as to why this indicator is false are detailed below.
8. Click Archive button to proceed (a warning will be displayed showing number of items to be archived) and Yes if you wish to continue. The warning pop-up allows abort of the process by selecting No.

REASONS ITEMS ARE NOT ABLE TO BE ARCHIVED

There are a host of reasons an item is not able to be archived. These include:

- Balances not zero (on hand, committed, on order (Forward/Backorder/PO/Requisition etc.)
- In an active stock take
- Due to subcomponent and parent dependencies
- In a Bill of Materials
- On a transaction that falls within threshold days

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
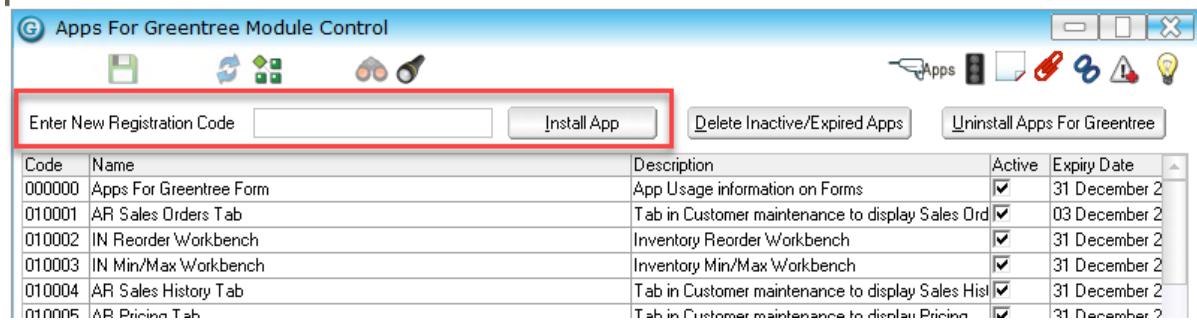
4. Select/Highlight the Bulk Archive Inventory Items App.
5. Click on the Edit Users button and select the users who will be configured to use this App, for which companies.
6. Save and Close the form.