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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

USER INSTRUCTIONS

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

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	Accounts <u>R</u> eceivable >	
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	Fixed Assets	
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	Translations	
	Inventory	Module Control
	Job Cost	Masterfile <u>A</u> udit Log
	Ma <u>n</u> ufacturing	Advanced Pricing Structure Maintenance
	Purc <u>h</u> ase Orders	Default Price Book <u>H</u> ierarchy
	Quality Control	Generic Unit Conversion Maintenance
	Sales Orders	A <u>n</u> alysis Code
	System Setup	Status Maintenance
	Ta <u>x</u> ation	Delivery Method Maintenance
	Trees	Te <u>x</u> t Type Maintenance
	<u>U</u> tilities	Transaction Type Maintenance
	Open <u>W</u> eb Admin	Location Maintenance
	eXch <u>a</u> nge EDI 🛛 🕨	Warehouse Bin Management
	Custo <u>m</u> isation	Posting Period Maintenance
_	eT <u>i</u> mesheets	Price Boo <u>k</u> Maintenance
	Point of Sale	Inventory Item Tree Maintenance
_	WebView	Inventory Item User Field Maintenance
	Apps For Greentree	Stocktake <u>C</u> ycle Maintenance
-	Pts/Rebates	Units of Measure Maintenance
	Trust Draw Down	Sup <u>e</u> rcession Maintenance
	eDocs	Se <u>r</u> ial Lot
	IPM •	IN Transaction Entry Security
	h	Wa <u>r</u> ehouse Personnel Maintenance
		IN Reorder Strategy Maintenance
		IN Reorder <u>C</u> onstant Maintenance
		Bulk archive items

2. Enter Analysis Code if required

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Main	74LCD Defaults		Bulk archi			eliel				00	X
Analysis code	MONITO		ysis code:	MONITO	V	Search	3 items found				
Decimal item unit	0 Decimal Places		Status:	<alb< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td></alb<>							
lob activity code	STOCK (Stock)			✓ <u>O</u> nly show	items that can be archived						
Туре	Not Serial/Lot Item	1								S <u>e</u> lect a	al
			Code		Description		Status	Balance	Can archive?	Select	
		1000	BENQ17G774L	CD	BenQ 17" LCD Monitor Standa	rd	Active	0	true		
Kitsets exist		None									
Kitsets exist	0000	Non c	SAMS19MONIT	ORNEW	Samsung 19		Active	0	true		

- 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.

Bulk archi	ve Inventory items				
Analysis code:	<all> Search</all>	3 items found			
Status:	Superseded 🔍				
	☑ Only show items that can be archived				
					S <u>e</u> lect all
Code	Description	Status	Balance	Can archive?	Select
610000	Supra Intel S10000	Superseded	0	true	
610001	Supra Intel S10001	Superseded	0	true	
620000	Supra Intel S20000	Superseded	0	true	
					Archive

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

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

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Enter Ne	ew Registration Code		Install App	Delete Inactive/Expired Apps	stall App	s For Greentree
Code	Name		De	scription	Active	Expiry Date
000000	Apps For Greentree Form		Ap	o Usage information on Forms	V	31 December 2
010001	AR Sales Orders Tab		Ta	b in Customer maintenance to display Sales Ord		03 December 2
010002	IN Reorder Workbench		Inv	entory Reorder Workbench	~	31 December 2
010003	IN Min/Max Workbench		Inv	entory Min/Max Workbench	V	31 December 2
010004	AR Sales History Tab		Ta	b in Customer maintenance to display Sales His		31 December 2
010005	AB Pricipa Tab		Ta	h in Customer maintenance to display Pricing		31 December 2

- 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.