VERSION 2.0 NOVEMBER 30, 2022

Apps for Greentree

JC AR INVOICE EMAIL ATTACHMENTS

APP NUMBER: 100090

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	. 2
Important Notes	. 2
Other Requirements	. 2
Jser Instructions	. 3
JC AR Invoice Entry	. 3
Cost from Service Request	.6
Sub-Job Service Request attachments	.7
mplementation Guide	. 8
App Installation	. 8
Other Greentree Configuration	.9
App Configuration	.9

FEATURES

1. Allows JC AR Invoice and attachment(s) to be emailed at time of creation

This App allows you to attach supporting documentation to a Job Costing Invoice. The documentation can be stored against the Job or a Service Request, and selectively added as an attachment when the Job Cost Invoice is emailed.

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.
- The Task Processor will need to be restarted prior to using this app for the first email. Please contact your Greentree Consultant for assistance with this.

OTHER REQUIREMENTS

Greentree Modules: Job Cost

Associated Apps: Not required but available:

- 010055 Invoice Preview
- 010072 AR/JC Printed Invoice

USER INSTRUCTIONS

JC AR INVOICE ENTRY

| Data Entry | Job Cost | Job Invoicing | Job AR Invoice Entry

This App provides the ability to email a JC AR Invoice with selected attachments.

After saving a JC AR Invoice, recall it and click on the Email with attachments button.

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A popup allows the email address, subject and comments, plus offers any related documents that can be attached to the email.

The list of available potential attachments will display any attachments on the Job, it will also display attachments from the Service Request if one of the sales lines on the invoice relates to a cost line that was generated via the Service Request – either a Purchase Order or Timeline.

Select attachment(s) to include with the invoice by ticking the Select box against it.

Tick the Consolidate Selected Attachments box to combine them into a single attachment or leave it unticked to add them as separate attachments.

GT		Add to Email Queue		_ □
Email details				
Email Address	accounts@customer.com		Consolidate Selected Attachments	
Subject	Invoice		Signature (Read only)	
Comments		∧	Kind Regards, Jennifer Watson	0
Source	Name	Size Path	Summary Select	
Job 5001, Service Job	for KAN Test1	87253 Test1.pdf	Job 5001, Service Job fo	
Job 5001, Service Job	for KAN Test2	71254 Test2.pdf	Job 5001, Service Job f 🔽	
			GT Consolidate	
			consondate	
			This will consolidate all selected attachments Are you sure?	
			Yes <u>N</u> o	Cancel

Clicking on OK then drops into the normal Report selection screen.

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	GT	Print Report: J	C AR Invoice	-L	_ □	\times		GL	- R (9 D 10 8	`∆⁺ ⊘
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Job Jot Cus Co Na Cu Ter Sal Cu De Pay	Set parameters	Parameter Batch From Batch To Customer Code From Customer Code To Invoice From Invoice To Reprint Invoices? Print Copy Only?	Value 44 44 1 1 1 1			GT Run a Deper	A A after: 2 ndency 1	Proforma Invoice dd to Task/Pr old Scheduld 6/10/18 🛱 None Pr	int Queue Set 14:56 inted copies Cancel	1	
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	Save Selection	Preview	Quick Print	<u>P</u> rint	Cancel						

Click Print, click OK.

The email will be sent with invoice pdf in the report format chosen, plus any selected attachments.

COST FROM SERVICE REQUEST

The following shows an example of a sales line, that has a cost which came from a service request

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Therefore, the Service Request attachment is also available to select.

SUB-JOB SERVICE REQUEST ATTACHMENTS

The configuration setting Include attachments to sub-job Service Requests, will cause all Service Requests on any sub-job to be available for selection as well.

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. Either enter the New Registration Codes supplied and click Install App or click the Check for Purchased Apps button to display a list of apps recently purchased or renewed to install in bulk.

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Enter N	lew Registration Code	İnstall Ap	p	Check for Purchase	d Apps	elete Inactive/	Expired Apps	Uninstall Apps For Greentree
_	Filter Apps	yiew Addi	6		_			
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count	-
000000	Apps For Greentree Form	App Usage information on Forms	₹	31 December 2099	0-Edit User	rs		
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	1	23 June 2020	100-Edit Us	se		
010002	IN Reorder Workbench	Inventory Reorder Workbench	•	25 June 2021	100-Edit Us	e Change	1	
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	•	30 June 2040	100-Edit Us	e Change		
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales His	1	31 December 2099	100-Edit Us	se		
010005	AR/IN Pricing Tab	Pricing Tab in Customer and Inventory Maintenand	1	28 May 2021	0-Edit User	rs		
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	•	31 December 2099	100-Edit Us	e Change		

4. Select/Highlight the JC AR Invoice Email Attachments App.

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Enter N	lew Registration Code		Install App		Delete Inac	tive/Expired Apps	Uninstall	Apps For Gree	entree
	Filter Apps		View Audits						
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count	-
000000	Apps For Greentree Form	App Usage information on F	orms	2	31 December 2099	0.Edit Urerr			
010001	AR Sales Orders Tab	Tab in Customer maintenant	ce to display Sales Orders	5	31 December 2099	100-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workben	ich	5	31 December 2099	TOO-LUIT OSEIS	Change		

5. Click on the Edit Users button and select the users who will be configured to use JC AR Invoice Email Attachments, for which companies.

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All Users					
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- 6. Once you have selected the users, Save the settings, and Close the window.
- 7. Save and Close the Module Control form.

OTHER GREENTREE CONFIGURATION

Not required for this app.

APP CONFIGURATION

- 1. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 2. Select/Highlight the JC AR Invoice Email Attachments App.
- 3. Click on the Change button.

GT	JC Invoice	Attachment Co	ontrol	_
	C %	6A @		D <i>D & &</i> ()
Subject Prefix	Invoice			
	Include attachm	nents to sub-job Se	ervice Requests	

Subject Prefix

Enter any text to use in the email subject as a prefix.

Include attachments to sub-job Service Requests

Tick to have sub-job service requests attachments available for selection in available attachments.