

VERSION 2.0
NOVEMBER 30, 2022

Apps for Greentree

JC AR INVOICE EMAIL ATTACHMENTS

APP NUMBER: 100090

Powered by:

MYOB Greentree

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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.

The screenshot displays the 'JC Job AR Invoice Entry' application. The interface includes a top navigation bar with icons for file operations and a toolbar. The main area is divided into several sections:

- Batch:** S44
- Branch:** 02 (Wellington)
- Last Invoice Number:** 1
- Job Detail:** Job 5001, Service Job for KANGAN
- Customer Detail:** Code 1000, Alpha KANGAN, Name Kangan Education Unit, Currency New, Rate 1.00000000, Terms 30 Days from Invoice Date, Salesperson Sally Scoresby, Customer Contact Brad Jones, Delivery Address (empty)
- Invoice Detail:** Proforma No (empty), Invoice No 1, Date 01 / 01 / 11, Hold Code None, Order No 1257, Format Invoice Long Format. A button labeled 'Email with Attacher' is highlighted with a red box.
- Invoice Amount:** Discount 0.00, Net 1562.50, Tax 195.31, Total 1757.81
- Table:** A table with columns: Tax, Code, Description, IN Code, IN Description, Quantity, Rate, Discount%, Discount, Tax Code, Tax%, Tax. The table contains one row: E, LAB, Labour Service Charge, (empty), (empty), 1.0000, 1562.5000, 0.00, 0.00, NZ GST, 12.50, 195.31.
- Footer:** Read Only: This invoice has been applied to

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:

Subject:

Comments:

Consolidate Selected Attachments

Signature (Read only)

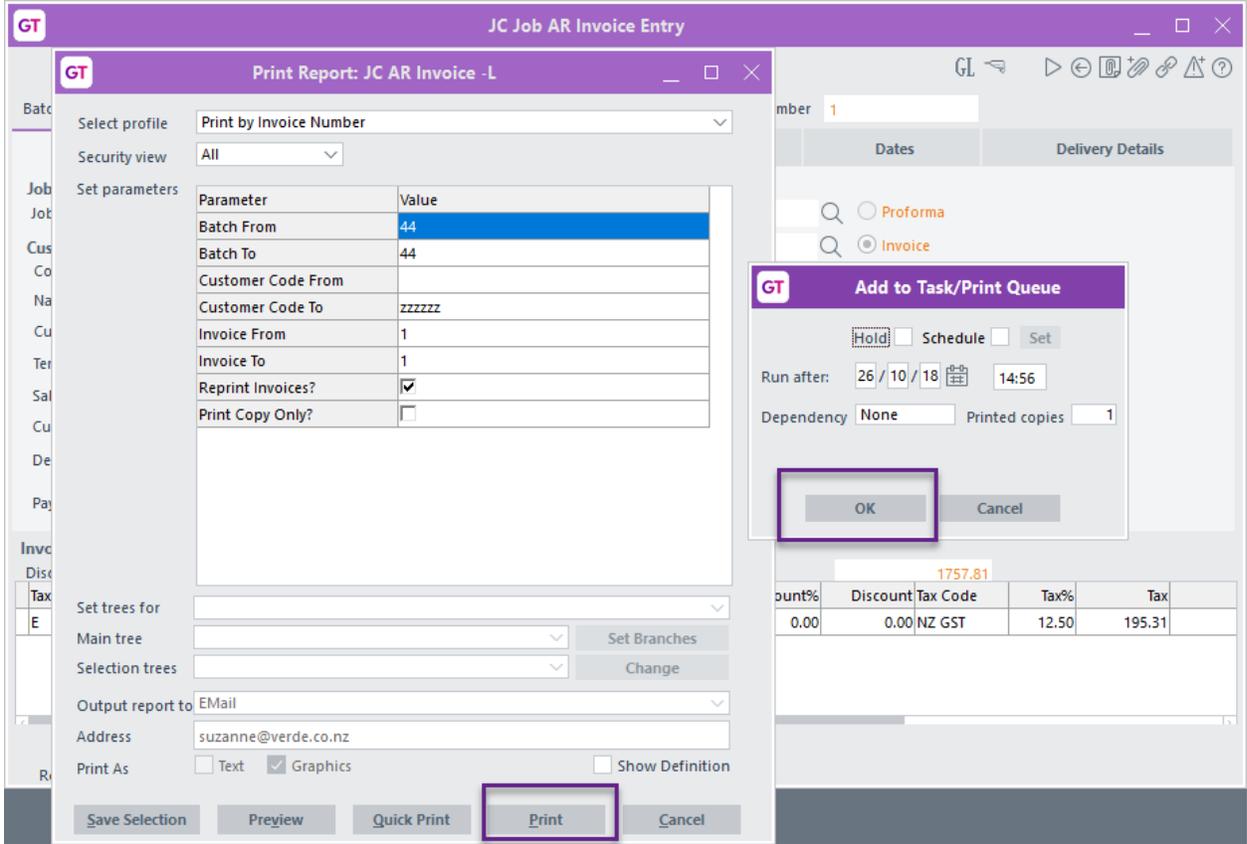
Kind Regards,
Jennifer Watson

Source	Name	Size	Path	Summary	Select
Job 5001, Service Job for KAN	Test1	87253	Test1.pdf	Job 5001, Service Job for	<input checked="" type="checkbox"/>
Job 5001, Service Job for KAN	Test2	71254	Test2.pdf	Job 5001, Service Job for	<input checked="" type="checkbox"/>

GT **Consolidate**

This will consolidate all selected attachments
Are you sure?

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



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

The screenshot displays two overlapping windows from the GT software. The top window is titled 'Service Request' and shows details for a request with Number 1219, Summary 'Check Air Con', and Employee 'Craig Clark'. The bottom window is titled 'JC Job AR Invoice Entry' and shows a table of costs. A row is highlighted with a purple box, showing 'LABASS Labour - Assembly' on 02/01/18, with a reference to 'James Smith' and a note 'testing add to tim'. Another row for 'CLEAN Labour Cleaner' on 26/10/18 is linked to 'S/R# 1219 - Check'.

Code	Activity	Date	IN Code	Reference	Quantity	Total Cost	Retail Rate	Total Retail	Do COS	Deferred	Write Off	Narration
LASUPP	Labour - Support	18/06/16		Beth Rose	2.8300	141.50	0.0000	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ADMIN	Administrative Work	18/06/11		Chelsea Cork	3.8300	306.40	120.0000	459.60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CLEAN	Labour Cleaner	14/05/11		Craig Clark	1.5000	67.50	70.0000	105.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CLEAN	Labour Cleaner	14/05/11		Craig Clark	2.8300	127.35	70.0000	198.10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LABASS	Labour - Assembly	02/01/18		James Smith	2.0000	110.00	50.0000	100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	testing add to tim
CLEAN	Labour Cleaner	26/10/18		Craig Clark	1.2500	56.25	70.0000	87.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	S/R# 1219 - Check

The screenshot shows the 'Add to Email Queue' dialog box. It contains fields for 'Email Address', 'Subject', and 'Comments'. Below these fields is a table listing email attachments. One row is highlighted with a purple box, showing the attachment 'SR 1219 Check Air Con' with Name '1219-20170228', Path '109025\JSEA1219-20170228.pdf', and Summary 'Maintenance - JSEA PE'.

Source	Name	Size	Path	Summary	Select
SR 1219 Check Air Con	1219-20170228	109025	JSEA1219-20170228.pdf	Maintenance - JSEA PE	<input type="checkbox"/>

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

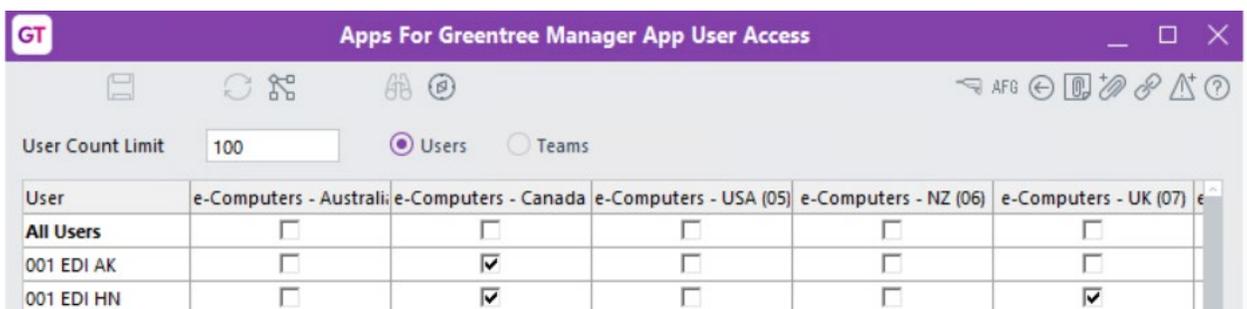
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Either enter the New Registration Codes supplied and click **Install App** or click the **Check for Purchased Apps** button to display a list of apps recently purchased or renewed to install in bulk.



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



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.



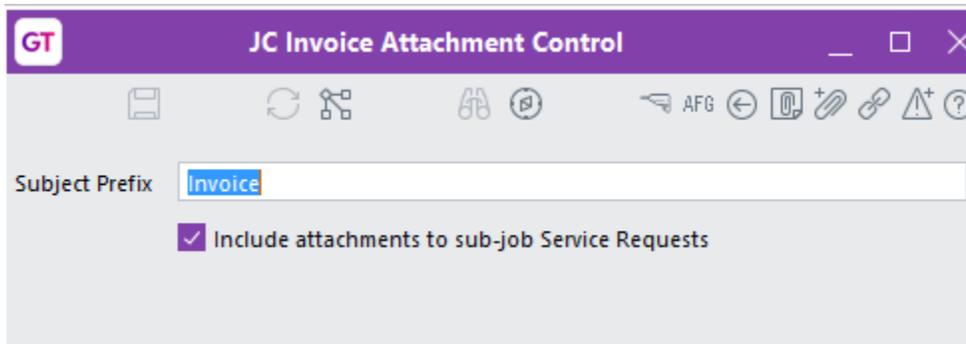
6. Once you have selected the users, **Save** the settings, and **Close** the window.
7. **Save** and **Close** the Module Control form.

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.



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.