

VERSION 2.0  
OCTOBER 26, 2018

# 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 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.

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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.
- 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.

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## OTHER REQUIREMENTS

**Greentree Modules:** Job Cost

**Associated Apps:** Not required but available:

- 010055 Invoice Preview
- 010072 AR/JC Printed Invoice

## USER INSTRUCTIONS

### JC INVOICE MAINTENANCE

| 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.

Batch S44 Branch 02 (Wellington) Last Invoice Number 1

Invoice Get Sales Narration Custom Dates Delivery Details

**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

**Invoice Detail**  
Proforma No  
Invoice No 1  
Date 01 / 01 / 11  
Hold Code None Pre-paid  
Order No 1257 Reprint  
Format Invoice Long Format

**Invoice Amount**  
Discount 0.00 Net 1562.50 Tax 195.31 Total 1757.81

Tax	Code	Description	IN Code	IN Description	Quantity	Rate	Discount%	Discount	Tax Code	Tax%	Tax
E	LAB	Labour Service Charge			1.0000	1562.5000	0.00	0.00	NZ GST	12.50	195.31

Payment Date 31 / 01 / 11 Posting Date 01 / 01 / 11 Period End 31 / 01 / 11

Read Only: This invoice has been applied to

A popup allows the email address, subject and comments, plus offer 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 attachments to include with the invoice by clicking the Select box against it.

**GT** Add to Email Queue

**Email details**

Email Address:

Subject:

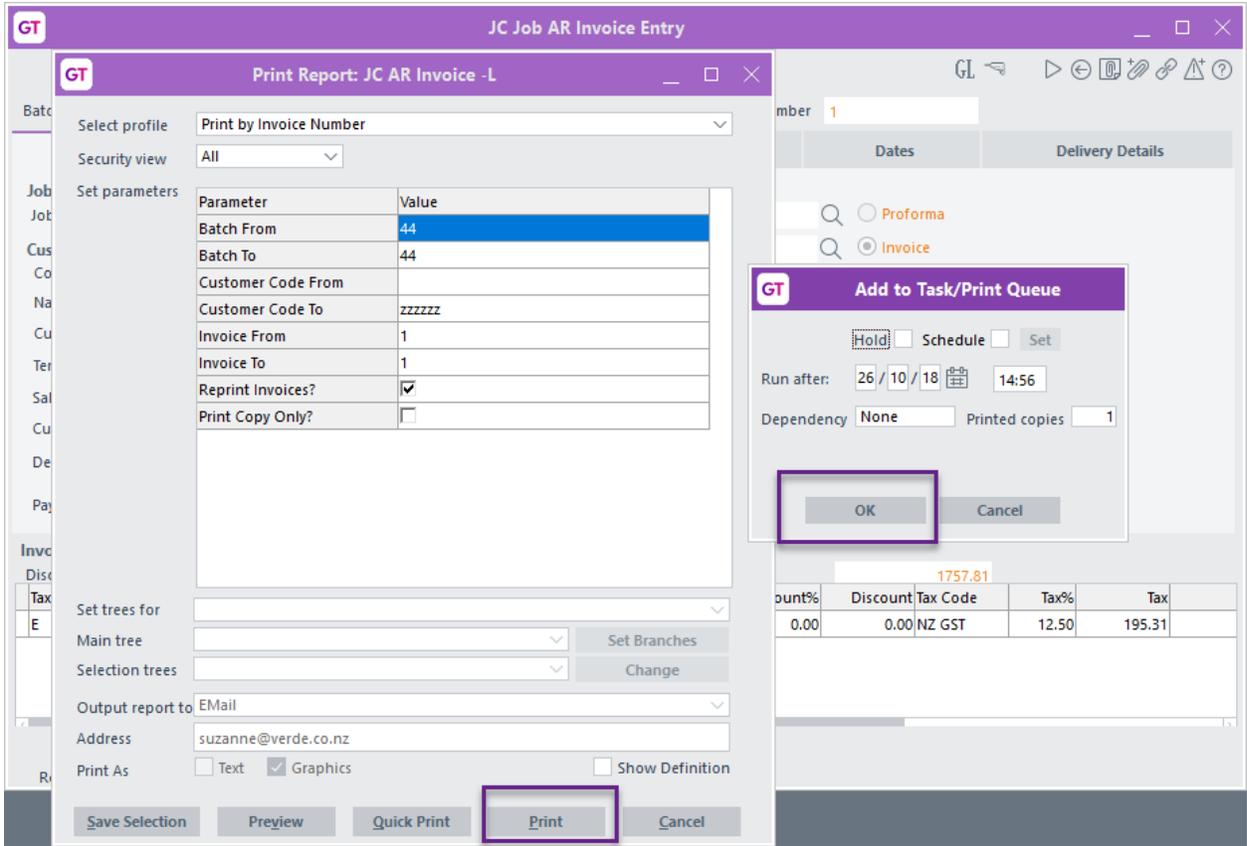
Comments:

Signature (Read only):

Source	Name	Size	Path	Summary	Select
Job 5001, Service Job for KAN	Alliance Logo.png	18487	Alliance Logo.png	JC Job [5001] [Service Jc	<input type="checkbox"/>

OK Cancel

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

**Service Request**

Number 1219 Cross Reference Summary Check Air Con View All

Main Additional Time Line Time Sheets Inventory Comments/Merge Security History Enquiry Custom Notes OPEN

Line Item

Employee: Craig Clark  
 Date: 26/10/18  
 Hours Total: 1.25  
 Weekending Date: 26/10/18  
 Posting Date: 31/10/18  
 Job: 5000 System for Kangan  
 Activity: CLEAN Labour Cleaner  
 Work Centre: SERV Service  
 Start Time: 0:00  
 Finish Time: 0:00  
 Man. Docket #  
 Narration  
 S/R# 1219 - Chec

**JC Job AR Invoice Entry**

Batch S1118 Branch 02 (Wellington) Last Invoice Number 143

Invoice Get Claim Items Current Costs Narration Custom Dates Delivery Details

Restrict to work centre

All  Time  Purchases  Stock  Disbursements

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 - Chec

Invoice Amount

Discount	Net	Tax	Total
0.00	4120.00	618.00	4738.00

Tax	Code	Description	IN Code	IN Description	Quantity	Rate	Discount%	Discount	Tax Code	Tax%	Tax
*	E	ACCMD		Accommodation	24.0000	45.0000	0.00	0.00	NZ GST	15.00	162.00
*	E	ACCMD		Accommodation	38.0000	80.0000	0.00	0.00	NZ GST	15.00	456.00
E					0.0000	0.0000	0.00		NZ GST		0.00

**Add to Email Queue**

Email details

Email Address: email

Subject:

Comments:

Signature (Read only):

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

OK Cancel

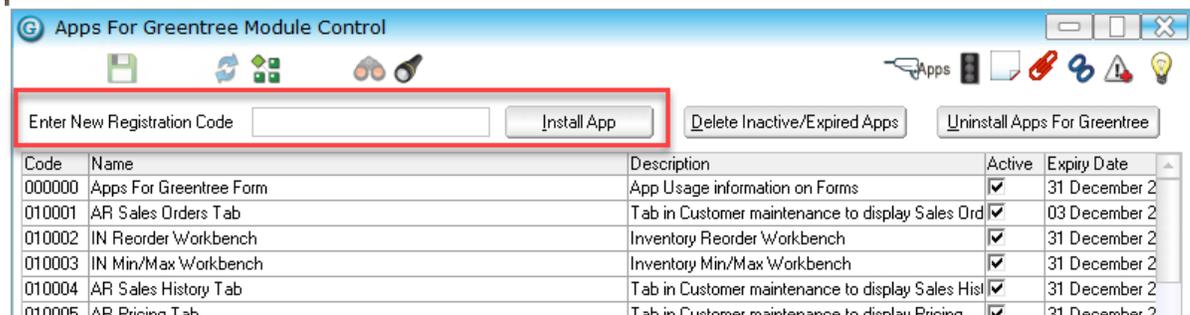
Therefore the Service request attachment is also available to select.

## 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 **JC AR Invoice Email Attachments** App.
5. Click on the **Edit Users** button and select the users who will be configured to use Email Tracker, for which companies.
6. **Save** and **Close** the form.