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.

#### **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 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.

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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.

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

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	Save Selection	Pre <u>v</u> iew	Quick Print	<u>P</u> rint	<u>C</u> ancel						

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.

# **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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010002	IN Reorder Workbend	ch			Inven	ory Reorder Workbench		<b>V</b>	31 December 2
010003	IN Min/Max Workber	nch			Inven	ory Min/Max Workbench		<b>V</b>	31 December 2
010004	AR Sales History Tab	I			Tab in	Customer maintenance to display Sal	es Hisl	<b>~</b>	31 December 2
010005	AR Pricing Tab				T ah in	Customer maintenance to display Priv	nina		31 December 2

- 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.