

VERSION 1.0
AUGUST 26, 2019

Apps for Greentree

ADVANCED SO CARRIER

APP NUMBER: 010095

Powered by:

MYOB Greentree

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FEATURES

1. Entry of Carrier on Sales Order headers

This App allows the Carrier to be selected on the header when entering a Sales Order. This flows through to the completion of the Packing Slip in terms of the label that is printed, or the file generated.

IMPORTANT NOTES

- Please note that this App currently only works in conjunction with the Freight App (010025)
- 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.

OTHER REQUIREMENTS

Greentree Modules: Sales Orders, Inventory, Accounts Receivable

Associated Apps: 010025 SO Freight (mandatory)

010006 Transaction User Defined Fields (required for freight analysis)

010029 SO Despatch (required for delivery labels and carton checking)

USER INSTRUCTIONS

INSTRUCTIONS

The Advanced SO Carrier App has been developed to allow the user to select the Carrier during the Sales Order Entry. This App also allows the user to select a label option when they complete a packing slip.

There are currently 2 options available. The user can select a file extract for UPS which is currently in an XML format, or they can select a label printer which prints the label directly.

SALES ORDER ENTRY

| [Data Entry](#) | [Sales Orders](#) | [Sales Order Entry](#) |

During sales order entry, optionally select the Carrier associated with the order from a predefined set. This will flow through to the packing slip but may be overridden.

The screenshot shows the 'SO Order Entry' application window. The 'Carrier' dropdown menu is highlighted with a red box, showing 'RoyalMail24' selected. The interface includes fields for Order Detail, Customer Detail, and a summary table at the bottom.

No.	Type	Account/Code	Transaction Type	Description	Location	Price Book	Quantity	Price	Tax Code	Tax Amt	D
1	IN	01MIS	Issue	MSI Dual Core Desktop	01	RETAIL	12.0000	3100.0000	NZ GST	5598.60	1
2	IN		Issue			RETAIL	0.0000	0.0000	NZ GST	0.00	1

PACKING SLIP MAINTENANCE

| Data Entry | Sales Orders | Packing Slip Maintenance |

When you click on the **Complete** button on the packing slip, this form will display. The selection of Carrier at this point is enabled by this App. It also requires that the 010025 App setting for Display Courier information is ticked. Please refer to screen shot in App Configuration.

Freight	Description	Qty	Select
---------	-------------	-----	--------

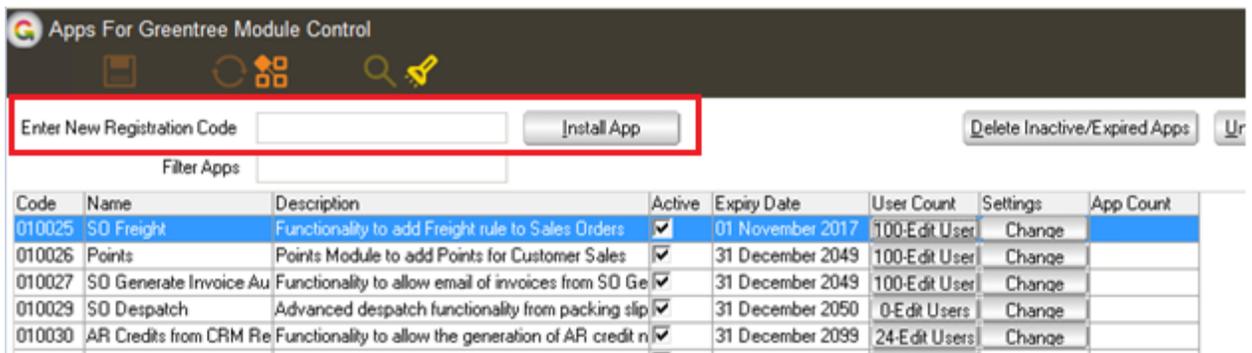
There is a **Test print label** button if you are logged in as the Super user. There is also the ability to review and update the Carrier for the label generation (or UPS file generation). This will be the Carrier selected on the Sales Order. You can also change it at this point, and it will update back to the Sales Order once you complete this Packing Slip by clicking on the Ok button.

IMPLEMENTATION GUIDE

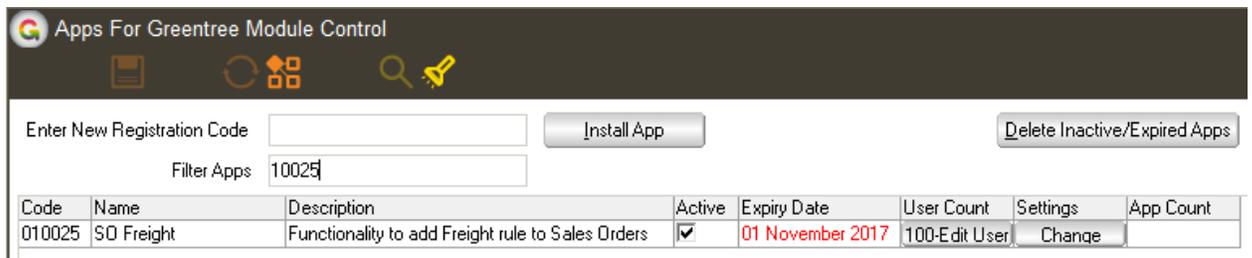
Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

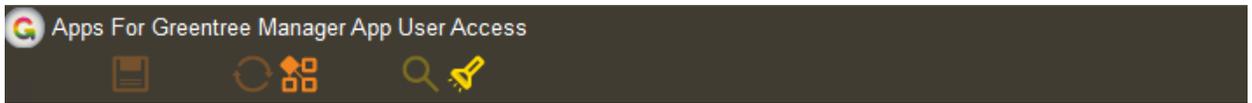
1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** | 3.
Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the **Advanced SO Carrier** App.



5. Click on the **Edit Users** button and select the users who will be configured to use this app, for which companies.



User Count Limit

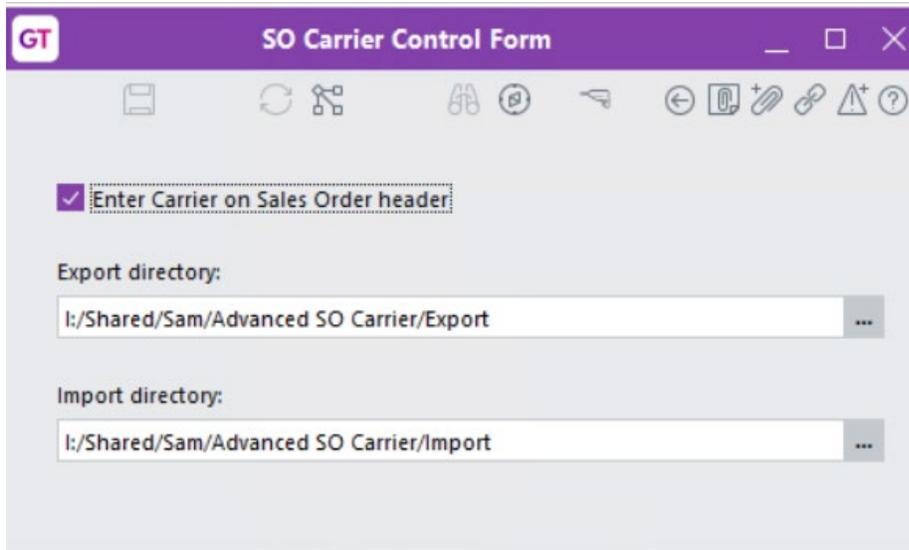
User	e-Computers - Australia (1)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela				<input checked="" type="checkbox"/>	
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin				<input checked="" type="checkbox"/>	

- Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
- Save** and **Close** the form.

APP CONFIGURATION

SO ADVANCED CARRIER CONTROL

- Log in to Greentree as the *Super* user
- Select the menu item | System | Apps For Greentree | Apps Module Control |
- Locate the **Advanced SO Carrier** App in the list and click on the **Change** button beside it.



Enter Carrier on Sales Order header

The checkbox controls whether the Carrier can be entered on the order header.

Export directory

The export directory must be a valid directory on the server and this is where the UPS files will be extracted to.

Import directory

The import directory is currently not developed and more will come in a future release. This will be used to update UPS ticket numbers.

SO FREIGHT CONTROL

1. Log in to Greentree as the *Super* user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Locate the *SO Freight* App in the list and click on the *Change* button beside it.

GT Freight Control

SO Packing Slip Complete Action

- Print packing slip SO PackingSlip - I
- Email Packing Slip SO PackingSlip - I
- Print Consignment 1. PPL - Consignm
- Number of copies 3
- Finalise
- Invoice
- Print invoice
- Email invoice
- Export Invoice E:\Temp\AcmeTemp\ExportInvoices

Freight Setup

- Use Auto Complete
- Hide Save Unconfirmed
- Hide Print Invoice
- Hide Generate Invoice
- Auto Add Freight on PS
- Use SO Location Whouse

Text of Packing Slip email

Hello
Please find your packing slip attached.

Picked by Checked by Packed by Confirmed by

- Mandatory
- Update Narratio
- Validate Password
- Display Courier Information

Default Courier FedEx

File NZ Courier C:\temp

Display Packaging Information

Display Despatch Date

Allow Zero Boxes on Complete

Print Actual Weight

Update Sales Order Narration

Is Courier Mandatory

Update Courier Info to Narration

Include Auto Print Info

Use Packaging Type

Stock Courier Tree Courier

Stock Package Type Tree Packaging Ty

Stock Quantity UDF Quantity

Location Transfer

- Add Freight Finished Goods F
- Mandatory

JC AR Invoice

- Use Freight

SO Sales Order

- Prefix Sales Order Reference with Branch

Printer settings

- Customer Delivery Labels AR App Customer Label
- Packing Slip Delivery Labels SO Delivery label
- GT Report
- Barcode Printer

Customer settings

- Default Freight Type LeeTest

Editing an existing SO Freight Control

OTHER GREENTREE CONFIGURATION

CARRIER MAINTENANCE

Set up valid Carriers in Carrier Maintenance.

The SO Carrier form has been altered slightly from the original Greentree design by the addition of a range of options at the bottom of this form. This App adds the extra fields.

[System](#) | [Sales Orders](#) | [Carrier Maintenance](#)

The screenshot shows a web application window titled "SO Carrier Maintenance". The form contains the following fields and options:

- Code:** RoyalMail24
- Name:** Royal Mail
- Address:** 654
- Suburb:** (empty)
- Post code:** (empty) | **City:** (empty)
- Country:** New Zealand
- Phone:** (00) 000 0000
- Fax:** (00) 000 0000
- Contact:** (empty)
- Email:** (empty)
- Consign number mandatory
- Packing Slip Confirmation:**
 - Default
 - Generate file for UPS
 - Print label
- Barcode printer:** Royal Mail 24
- Service code:** (empty)

Ready SO Carrier Company 3 of 4

Packing Slip Confirmation:

Default

This is equivalent to None.

Generate file for UPS

If this is ticked then an export file will automatically be generated to the file location specified as Export Directory in the app configuration.

Print label

If this is ticked then a barcode label will be generated

Barcode printer

If Print label is ticked a valid printer must be selected. If Print label is not ticked, this field will not display.

Service code

Enter the service type. This is included in the exported UPS file. Refer to example below. This is only relevant to UPS, representing the Carrier involved.

BARCODE PRINTER MAINTENANCE

System | Utilities | Barcode Printer Maintenance

Barcode printer definition is contained in 010029 SO Despatch documentation.

XML FILE EXAMPLE

Below is a screenshot of an example XML file created for UPS.

```
<?xml version="1.0" encoding="WINDOWS-1252"?>
- <OpenShipments xmlns="x-schema:OpenShipments.xdr">
  - <OpenShipment ShipmentOption="" ProcessStatus="">
    - <ShipTo>
      <CompanyOrName>Highstone High</CompanyOrName>
      <Attention>Bob</Attention>
      <Address1>2 Davies Road</Address1>
      <CountryTerritory>United Kingdom</CountryTerritory>
      <CityOrTown>Addington</CityOrTown>
      <PostalCode>8024</PostalCode>
      <Telephone>(03) 984 1123</Telephone>
    </ShipTo>
    - <ShipmentInformation>
      <ServiceType>SL</ServiceType>
      <PackageType>CP</PackageType>
      <NumberOfPackages>1</NumberOfPackages>
      <ShipmentActualWeight>0.050</ShipmentActualWeight>
      <DescriptionOfGoods/>
      - <PrinterID>
        <LabelID>Zebra Printer</LabelID>
      </PrinterID>
      <Reference1>01.500314.01</Reference1>
      <Reference2/>
    </ShipmentInformation>
  </OpenShipment>
</OpenShipments>
```