VERSION 2.0 OCTOBER 2, 2018

Apps for Greentree

CONVERT SR SCHEDULED TIME TO A JC TIMESHEET

APP NUMBER: 010111

Powered by:

MYOB Greentree

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FEATURES

1. Convert SR Scheduled Time to a JC Timesheet

This App is designed to record Employees' time on JC Jobs where the organization uses the CRM Service Request scheduler to plan and organize the daily activities for their employees.

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.

OTHER REQUIREMENTS

Greentree Modules: Job Cost

Associated Apps: None

USER INSTRUCTIONS

ALLOCATING TIME ON A SERVICE REQUEST

| CRM | Service & Support | Service requests

िंज				Service Reques	t					_
	6 X C	# (← ←	$\rightarrow \rightarrow \rightarrow$							• ⊕ □ <i>∅ ℰ ∆</i> ⑦
Number 1217	Cross Refer	ence	🔍 Summary	Check Air Con					Q	View All 🗸
Main Addition	al Time Line	Time Sheets	Inventory	Comments/Merge	Security	History	Enquiry	Custom	Notes	OPEN
Opened By	SUPER	~	At 01 / 03	/ 17 🜐 10:38 AM	\sim					<u>A</u> ttachments (1)
Closed By		\sim	At /	/ 0:00 AM	\sim					Search Knowledge Base
Scheduled To	Craig Clark	~	At 23 / 08	/ 16 🟥 4:00 PM	✓ Finish B	y 23 / 08	/ 16 🛱	5:00 PM \sim		Issue PO
Outsourced To		<u></u> Q	At _/	/ 🛱 0:00 AM	\sim					
Acknowledged By		~	At /	/ 🛱 0:00 AM	✓ SLA					Assign <u>J</u> ob
Responded By		~	At /	/ 🛱 0:00 AM	✓ SLA					Action Plans (0)
Resolved By		~	At /	/ ∰ 0:00 AM	✓ SLA					Re-list
Requested Empl Type		~	At /	/	~					-
Requested Employee		~	At /	/ == 0:00 AM	~					Quote
User Defined 1		~	At /	/ 🛱 0:00 AM	~					Create Follow-up
User Defined 2		~	At /	/ 壁 0:00 AM	×					Create Communication
Extra SV People	Service Person	Surname	Comment							Create Actio <u>n</u>
										Fin <u>d</u> Contract
										S <u>h</u> ow Times
										Start/Stop Timer
Field Service Sched	ule dar Business-NZ	~	Costs		20					Asset Usa <u>q</u> e
Allocated Hours	0d 0w	0.00	Other C	Tost 0.	10					Show Field Actuals
Scheduled Work	ing Hours	1.00	Time Se	II 0.0	20					
Slack Time		0.00% 0.00	Other S	iell 0.0	00					Show Summary
Elapsed Time (24	x 7)	1.00								
Unallocated Hou	urs	0.00								Merge
Effort to Comple	te	0								-
Percentage Com	plete	0								
Ready					Service Request	41 of 44				

The work has been allocated to Craig Clark for a total of 1 hour from 4pm to 5pm.

CONVERT TIME ON SR TIMELINE TO A JC TIMESHEET

| CRM | Service Request to Timesheet

										earch	Se		ed To: n: 01/08/16 🛱 31/08/16 🛱	Schedules Date from Date to:
Deselect All	Select <u>A</u> ll													
Description	Narration	Hrs/Qty Select	Finish	Start	Work Ctr	Activity	Description	Job	Day	Posting	Week endir	Date	Employee 🗠	SR#
	S/R# 1183 - Annual Leave	<u>~</u>			_				Thu	31/08/16	26/08/16	25/08/16	Beth Rose	1183
	S/R# 1183 - Annual Leave	<u> </u>							Wed	31/08/16	26/08/16	24/08/16	Beth Rose	1183
	S/R# 1183 - Annual Leave	<u> </u>		_	_				Tue	31/08/16	26/08/16	23/08/16	Beth Rose	183
nthly	S/R# 1177 - 1177. Inspection. Month	3.00							Mon	31/08/16	26/08/16	22/08/16	Beth Rose	1177
Administra	S/R# 1213 - Install Console	8.00			ADMIN	ADMIN	Methven Conversion	5804	Thu	31/08/16	19/08/16	18/08/16	Cameron Cook	1213
Administra	S/R# 1212 - Install Power Supply	5.00 🗸			ADMIN	ADMIN	Methven Conversion	5804	Wed	31/08/16	26/08/16	24/08/16	Cameron Cook	212
Administra	S/R# 1210 - Prep Site	2.67 🗸			ADMIN	ADMIN	Methven Conversion	5804	Mon	31/08/16	26/08/16	22/08/16	Cameron Cook	210
ily Ch	S/R# 1081 - 1081. Service. Monthly C	3.00 🔽							Wed	31/08/16	26/08/16	24/08/16	Cameron Cook	1081
Ily Che Administra	S/R# 1080 - 1080. Service. Monthly C	4.00 🔽			ADMIN	ADMIN	Auckland City Council	00AH	Thu	31/08/16	26/08/16	25/08/16	Cameron Cook	1080
Administra	S/R# 1071 - Broken Side Panel	2.50 🔽			ADMIN	ADMIN	Plant Maintenance	5008	Mon	31/08/16	26/08/16	22/08/16	Cameron Cook	1071
h Administra	S/R# 1068 - Rear Toilet Door Latch	4.00 🔽			ADMIN	ADMIN	System for Kangan	5000	Thu	31/08/16	26/08/16	25/08/16	Cameron Cook	068
ily Ch	S/R# 1081 - 1081. Service. Monthly C	3.00 🔽							Wed	31/08/16	26/08/16	24/08/16	Chelsea Cork	1081
Administra	S/R# 1217 - Check Air Con	1.00 🔽			ADMIN	ADMIN	System for Kangan	5000	Tue	31/08/16	26/08/16	23/08/16	Craig Clark	1217
Administra	S/R# 1215 - Training End User	v			ADMIN	ADMIN	Methven Conversion	5804	Wed	30/09/16	02/09/16	31/08/16	Craig Clark	215
Administra	S/R# 1214 - Training Overview	v			ADMIN	ADMIN	Methven Conversion	5804	Mon	30/09/16	02/09/16	29/08/16	Craig Clark	214
Administra	S/R# 1214 - Training Overview	~			ADMIN	ADMIN	Methven Conversion	5804	Sun	30/09/16	02/09/16	28/08/16	Craig Clark	214
quirec Administra	S/R# 1182 - KANGAN - Clean Requir	3.00 🔽			ADMIN	ADMIN	System for Kangan	5000	Sat	30/09/16	02/09/16	27/08/16	JOHN BROWN	182
	S/R# 1081 - 1081. Service. Monthly (3.00 🔽							Wed	31/08/16	26/08/16	24/08/16	JOHN BROWN	081
ily Ch	C 10 11 4070 C	7.97 🔽							Tue	31/08/16	19/08/16	16/08/16	JOHN BROWN	1078
nly Ch	S/R# 1078 - Special Clean												-	

Enter a date range and click Search to populate unallocated time on a service request.

Tick Select to allocate any of the lines to a timesheet.

GT							Sei	rvice Req	juest T	o Timeshe	et					
Scheduler Date from Date to:	l To: 01/08/16 ∰ 31/08/16 ∰	0 € €	Sea	arch												Select <u>A</u> ll
SR#	Employee 🕬	Date	Veek endin	Posting	Day	Job	Descriptio	on		Activity	Work Ctr	Start	Finish	Hrs/Qty Selec	t Narra	tion
1183	Beth Rose	25/08/16 2	6/08/16	31/08/16	Thu									~	S/R#	1183 - Annual Leave
1183	Beth Rose	24/08/16 2	6/08/16	31/08/16	Wed										S/R#	1183 - A <mark>n</mark> nual Leave
1183	Beth Rose		C 100.14 C		-					1				-		
1177	Beth Rose	GT							Servi	ice Reques	t					_ 🗆 ×
1213	Cameron Cook	P A P	h C	₩ 🖨	GA	<u> </u>	<u> </u>								D	0
1212	Cameron Cook			o`o 4≡r				21								
1210	Cameron Cook	Number 1183	Q	Cross Refe	rence		Q <u>4</u>	Summary	Annual	Leave					\odot	View All 🗸
1081	Cameron Cook	Main Ar	- Iditional	Time Lin	. т	ime Sheets	Inve	ntony	Comme	ents/Merce	Secur	ity	History Enquin	Custom	Notes	OPEN
1080	Cameron Cook		annonai			inic sheets	mve		4 c 10+0	ind, weige	Jecui	ity	instory criquity	Custom	Hotes	Attachments (0)
1071	Cameron Cook	Opened By	SUPE	ER		~	At	19/08/	10 #	11:17 AM	~					Attachments (0)
1068	Cameron Cook	Closed By				~	At		Ē	0:00 AM	~					Search Knowledge Base
1081	Chelsea Cork	Scheduled To	Beth	Rose		~	At	23 / 08 /	16 🌐	9:00 AM	✓ Fi	inish By	25 / 08 / 16 🛱	5:00 PM \sim		Issue PO
1217	Craig Clark	Outsourced To				0	2 At	_/_/	#	0:00 AM	\sim					issuerro
1215	Craig Clark	Acknowledged	Ву			~	At	_/_/	(0-0) (##)	0:00 AM	∨ SL	A				Assign Job
1214	Craig Clark	Responded By				~	At		0-0 ##	0:00 AM	∨ SL	A				Action Plans (0)

If there isn't a time in the Hrs/Qty Column this means the job runs over multiple days and you will need to enter the quantity in manually.

Once you happy with the lines you have selected hit save.

1071	Cameron Cook	22/08/16	26/08/16	31/08/16	Mon	5008	Plant Maintenance	ADMIN	ADMIN	2.50		S/R# 1071 - Broken Side Panel	Administrati
1068	Cameron Cook	25/08/16	26/08/16	31/08/16	Thu	5000	System for Kangan	ADMIN	ADMIN	4.00		S/R# 1068 - Rear Toilet Door Latch	Administrati
1081	Chelsea Cork	24/08/16	26/08/16	31/08/16	Wed		GT Valid	ate error		3.00		S/R# 1081 - 1081. Service. Monthly Ch	
1217	Craig Clark	23/08/16	26/08/16	31/08/16	Tue	5000				1.00		S/R# 1217 - Check Air Con	Administrati
1215	Craig Clark	31/08/16	02/09/16	30/09/16	Wed	5804	Row 19 must h	ave a Job C	ode entered			S/R# 1215 - Training End User	Administrati
1214	Craig Clark	29/08/16	02/09/16	30/09/16	Mon	5804						S/R# 1214 - Training Overview	Administrati
1214	Craig Clark	28/08/16	02/09/16	30/09/16	Sun	5804	OF	1				S/R# 1214 - Training Overview	Administrati
1182	JOHN BROWN	27/08/16	02/09/16	30/09/16	Sat	5000				3.00		S/R# 1182 - KANGAN - Clean Required	Administrati
1081	JOHN BROWN	24/08/16	26/08/16	31/08/16	Wed					3.00		S/R# 1081 - 1081. Service. Monthly Ch	
1078	JOHN BROWN	16/08/16	19/08/16	31/08/16	Tue					7.97	~	S/R# 1078 - Special Clean	
1175	James Smith	22/08/16	26/08/16	31/08/16	Mon					3.00		S/R# 1175 - 1175. Service. Replace Air I	
E													
												Save	Close

If you select a row and there is a missing job or activity, a message will display with the details.

G	т		Cont	firmation		
- (?	Are y	ou sure you war	nt to update 4 tir	mesheet entries?	
-			<u>Y</u> es	<u>N</u> o		

You are prompted to confirm the update of timesheets

4 2									Sei	vice Requ	est						
	Ì (C % 5	à 69	$\leftarrow \leftarrow$	\rightarrow	\rightarrow											
Number 1215	(्र Cross Re	eference	0	2 :	iummary 1	fraining End User					Q	View All	\sim			
Main		Additiona	al	Time Line		Time	Sheets	Inventory	Com	ments/Mer	ge Sec	urity	Histo	ry	Enquiry	Custom	Notes
Line Item										_							
Employee	Cra	aig Clark	Q	Craig Clark							Save <u>L</u> ine						
Date	02	/ 10 / 18 🛱	* ±	Hours Total	4.00						Dis <u>b</u> ursements						
Weekending Date	05	/ 10 / 18 🛱	*	Posting Date	31 /	10 / 18 🛱]				Issue Inventory						
Job	580	04		Methven Co	nversi	on					-						
Activity	CLE	EAN	Q	Labour Clea	ner						<u>I</u> ssue PO						
Work Centre	SEF	RV	Q	Service							Payables Invoice						
Start Time	0:0	0	\sim	Finish Time	0:00)	✓ Hours/Qty	0									
Man. Docket #				Narration	S/R	# 1215 - Tra	ining End User										
Employee		Date	Week endi	in Posting	Day	Job	Description	Activity	Description	Work Ctr	Description	Start	Finish	Hrs/Qty	Man. Dkt. #	Narration	
Craig Clark		23/08/16	26/08/16	31/08/16	Tue	5804	Methven Conversio	TRAIN	Training	TRAIN	Training	10.00	14.00	4.00		S/R# 1215 - Trai	ning End User
Craig Clark	Q	02/10/18	05/10/18	31/10/18	Tue	5804	Methven Conversion	CLEAN	Labour Cleaner	SERV	Service					S/R# 1215 - Trai	ning End User

Resulting Changes will impact the Service Request Time Sheet

GT						JC Time	Sheet Entry						_ □) X
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Batch	S1006		Branch 03 (Christchurc	h) \sim	Last	t Reference Number	CLARKC						
			Timeshe	et Header						Line	ems			
Employ	ee Deta	il												
Surnam	ne	Clark	$\overline{\mathbb{Q}}$	Detail										
First Na	ame	Craig	\odot	Week Er	nding Date 26 / 0	8 / 16 🛱	< >							
Employ	ree No	CLARKC	\odot	Posting	Date 31 / 0	8 / 16 📰								
Narratio	on S/R#	1214												
Totals Sat	Sun	Mon	Tue Wed Thu	Fri	All 🔽 Total	Hours		Total C	ther					
			14.00		14.00)								
Date	Day	Job	Description	Activity	Description	Work Ctr	Description	Start	Finish	Hrs/Qty	Notes			
23/08/16	5 Tue	5804	Methven Conversio	TRAIN	Training	TRAIN	Training	8.00	18.00	10.0000	S/R# 1214 -	Training Overvie	ew	
23/08/16	5 Tue	5804	Methven Conversio	TRAIN	Training	TRAIN	Training	10.00	14.00	4.0000	S/R# 1215 -	Training End Us	er	
23/08/16	5 Tue			CLEAN	Labour Cleaner	SERV	Service			0.00				
Read	y						There are	20 Timesheets	for Craig Cla	rk				

Also on the job cost timesheet

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
- Select the menu item | System | Apps for Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App

G Ap	os For Greentree Module (Control					
	8 🖉 🔠	in 1			Apps		9 🚱 🔔 💡
Enter N	ew Registration Code		Install App		Delete Inactive/Expired Apps	nstall App	s For Greentree
Code	Name			Descri	ption	Active	Expiry Date 🔼
000000	Apps For Greentree Form			App U	sage information on Forms	•	31 December 2
010001	AR Sales Orders Tab			Tab in	Customer maintenance to display Sales O	rd 🔽	03 December 2
010002	IN Reorder Workbench			Invent	ory Reorder Workbench	~	31 December 2
010003	IN Min/Max Workbench			Invent	ory Min/Max Workbench	~	31 December 2
010004	AR Sales History Tab			Tab in	Customer maintenance to display Sales H	isl 🔽	31 December 2
010005	AB Pricing Tab			T ah in	Pustomer maintenance to display Pricing		31 December 2

4. Select/Highlight the Convert SR Scheduled Time to a JC Timesheet App.

1								
G Ap	ps For Greentree	Module Co	ntrol					3
	8 🗳		10 🔊		-	SApps 🚦 🗔 🕻	6 6 🖉)
Enter N	lew Registration Code	gPKd6KCxE	91d4	Install App	Delete Inactive/Expired App	s <u>U</u> ninstall App	s For Greentree	
Code	Name				Description	Active	Expiry Date	h
010041	Report Writer Addition	al Methods			Functionality for additional Report Write	ter Report M	09 February 20	_
010042	JC Sales Code Long D	Description			Functionality to add a long description	to JC Sales 🔽	31 December 2	
010042	ARA Holeon				Additional ARA functionality including (nrogrammatic 🖬	21 December 2	

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

G Apps For Gre	entree Manager Ap	p User Access			
8	Ø 🏦	n 🔊		-ƏApps 🚦 🗔 🛃	ମ୍ଚି 🔏 💡
User Count Limit	100				
User	e-Computers - Australia ((e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers · 🔺
All Users					
001 EDI AK				V	
001 EDI HN				V	
ADMIN					
Amanda					
andrew					
Angela					
Angela Allen					
April Aston					
ashlin					

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