

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

The screenshot displays the 'Service Request' interface. The main window title is 'Service Request' and the summary is 'Check Air Con'. The interface includes a toolbar with various icons and a search bar. The 'Time Line' tab is active, showing a list of time allocations. The 'Field Service Schedule' section is expanded, showing a calendar for 'Business-NZ' with a total of 1.00 hour allocated from 4:00 PM to 5:00 PM on 23/08/16. The 'Costs' section shows a total time cost of 0.00. The 'Extra SV People' table is empty.

Service Person	Surname	Comment
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Field Service Schedule

Restrict to calendar: Business-NZ

Allocated Hours	0d 0w	0.00
Scheduled Working Hours		1.00
Slack Time	0.00%	0.00
Elapsed Time (24 x 7)		1.00
Unallocated Hours		0.00
Effort to Complete		0
Percentage Complete		0

Costs

Time Cost	0.00
Other Cost	0.00
Time Sell	0.00
Other Sell	0.00

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

SR#	Employee	Date	Week endin	Posting	Day	Job	Description	Activity	Work Ctr	Start	Finish	Hrs/Qty	Select	Narration	Description
1183	Beth Rose	25/08/16	26/08/16	31/08/16	Thu								<input checked="" type="checkbox"/>	S/R# 1183 - Annual Leave	
1183	Beth Rose	24/08/16	26/08/16	31/08/16	Wed								<input checked="" type="checkbox"/>	S/R# 1183 - Annual Leave	
1183	Beth Rose	23/08/16	26/08/16	31/08/16	Tue								<input checked="" type="checkbox"/>	S/R# 1183 - Annual Leave	
1177	Beth Rose	22/08/16	26/08/16	31/08/16	Mon							3.00	<input checked="" type="checkbox"/>	S/R# 1177 - 1177. Inspection. Monthly	
1213	Cameron Cook	18/08/16	19/08/16	31/08/16	Thu	5804	Methven Conversion	ADMIN	ADMIN			8.00	<input checked="" type="checkbox"/>	S/R# 1213 - Install Console	Administrat
1212	Cameron Cook	24/08/16	26/08/16	31/08/16	Wed	5804	Methven Conversion	ADMIN	ADMIN			5.00	<input checked="" type="checkbox"/>	S/R# 1212 - Install Power Supply	Administrat
1210	Cameron Cook	22/08/16	26/08/16	31/08/16	Mon	5804	Methven Conversion	ADMIN	ADMIN			2.67	<input checked="" type="checkbox"/>	S/R# 1210 - Prep Site	Administrat
1081	Cameron Cook	24/08/16	26/08/16	31/08/16	Wed							3.00	<input checked="" type="checkbox"/>	S/R# 1081 - 1081. Service. Monthly Ch	
1080	Cameron Cook	25/08/16	26/08/16	31/08/16	Thu	00AH	Auckland City Council	ADMIN	ADMIN			4.00	<input checked="" type="checkbox"/>	S/R# 1080 - 1080. Service. Monthly Ch	Administrat
1071	Cameron Cook	22/08/16	26/08/16	31/08/16	Mon	5008	Plant Maintenance	ADMIN	ADMIN			2.50	<input checked="" type="checkbox"/>	S/R# 1071 - Broken Side Panel	Administrat
1068	Cameron Cook	25/08/16	26/08/16	31/08/16	Thu	5000	System for Kangan	ADMIN	ADMIN			4.00	<input checked="" type="checkbox"/>	S/R# 1068 - Rear Toilet Door Latch	Administrat
1081	Chelsea Cork	24/08/16	26/08/16	31/08/16	Wed							3.00	<input checked="" type="checkbox"/>	S/R# 1081 - 1081. Service. Monthly Ch	
1217	Craig Clark	23/08/16	26/08/16	31/08/16	Tue	5000	System for Kangan	ADMIN	ADMIN			1.00	<input checked="" type="checkbox"/>	S/R# 1217 - Check Air Con	Administrat
1215	Craig Clark	31/08/16	02/09/16	30/09/16	Wed	5804	Methven Conversion	ADMIN	ADMIN				<input checked="" type="checkbox"/>	S/R# 1215 - Training End User	Administrat
1214	Craig Clark	29/08/16	02/09/16	30/09/16	Mon	5804	Methven Conversion	ADMIN	ADMIN				<input checked="" type="checkbox"/>	S/R# 1214 - Training Overview	Administrat
1214	Craig Clark	28/08/16	02/09/16	30/09/16	Sun	5804	Methven Conversion	ADMIN	ADMIN				<input checked="" type="checkbox"/>	S/R# 1214 - Training Overview	Administrat
1182	JOHN BROWN	27/08/16	02/09/16	30/09/16	Sat	5000	System for Kangan	ADMIN	ADMIN			3.00	<input checked="" type="checkbox"/>	S/R# 1182 - KANGAN - Clean Required	Administrat
1081	JOHN BROWN	24/08/16	26/08/16	31/08/16	Wed							3.00	<input checked="" type="checkbox"/>	S/R# 1081 - 1081. Service. Monthly Ch	
1078	JOHN BROWN	16/08/16	19/08/16	31/08/16	Tue							7.97	<input checked="" type="checkbox"/>	S/R# 1078 - Special Clean	
1175	James Smith	22/08/16	26/08/16	31/08/16	Mon							3.00	<input checked="" type="checkbox"/>	S/R# 1175 - 1175. Service. Replace Air	

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.

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							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								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								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 Require	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	<input checked="" type="checkbox"/>	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	

GT Validate error

Row 19 must have a Job Code entered

OK

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

GT Confirmation

Are you sure you want to update 4 timesheet entries?

You are prompted to confirm the update of timesheets

Service Request

Number 1215 View All

Line Item

Employee

Date Hours Total 4.00

Weekending Date Posting Date

Job Methven Conversion

Activity Labour Cleaner

Work Centre Service

Start Time Finish Time Hours/Qty

Man. Docket # Narration

Employee	Date	Week endin	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 Conversic	TRAIN	Training	TRAIN	Training	10.00	14.00	4.00		S/R# 1215 - Training End User
Craig Clark	02/10/18	05/10/18	31/10/18	Tue	5804	Methven Conversic	CLEAN	Labour Cleaner	SERV	Service					S/R# 1215 - Training End User

Resulting Changes will impact the Service Request Time Sheet

GT JC Time Sheet Entry

Batch S1006 Branch 03 (Christchurch) Last Reference Number CLARKC

Timesheet Header

Employee Detail

Surname Clark
 First Name Craig
 Employee No CLARKC

Detail

Week Ending Date 26 / 08 / 16
 Posting Date 31 / 08 / 16

Narration S/R# 1214

Totals

Sat Sun Mon Tue Wed Thu Fri All Total Hours Total Other

14.00 14.00

Date	Day	Job	Description	Activity	Description	Work Ctr	Description	Start	Finish	Hrs/Qty	Notes
23/08/16	Tue	5804	Methven Conversic	TRAIN	Training	TRAIN	Training	8.00	18.00	10.0000	S/R# 1214 - Training Overview
23/08/16	Tue	5804	Methven Conversic	TRAIN	Training	TRAIN	Training	10.00	14.00	4.0000	S/R# 1215 - Training End User
23/08/16	Tue			CLEAN	Labour Cleaner	SERV	Service			0.00	

Ready There are 20 Timesheets for Craig Clark

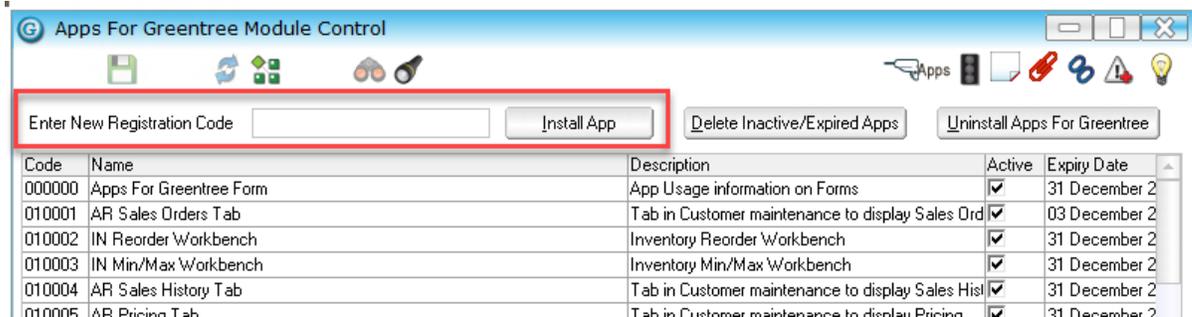
Also on the job cost timesheet

IMPLEMENTATION GUIDE

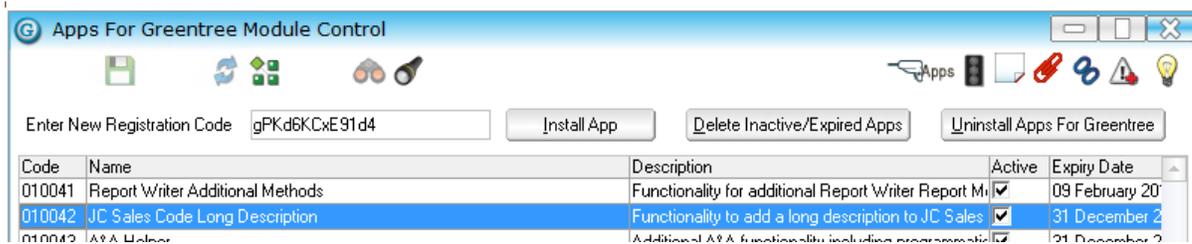
Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

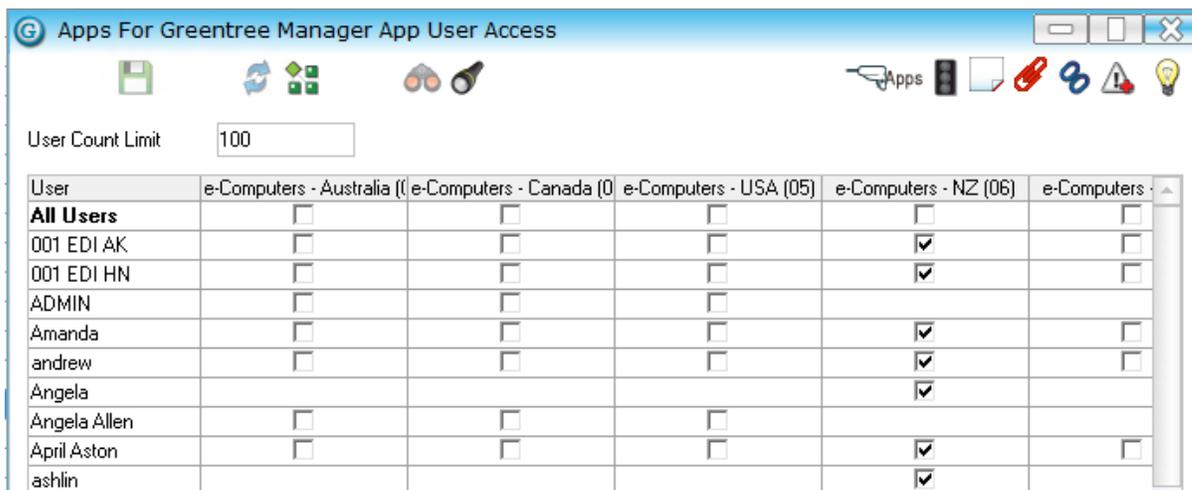
1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps for Greentree** | **Apps Module Control** | 3.
Enter the New Registration Codes supplied and click Install App



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



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



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.