

VERSION 1.0  
DECEMBER 10, 2019



## AR INVOICE EMAIL INTERFACE FILE

APP NUMBER: 010115

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. AR Invoice Email Attachment

This App provides functionality to email an interface file (csv) when an AR invoice is sent by email. The csv format can be made customer specific.

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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.
- This app does not work with Job cost lines.

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### OTHER REQUIREMENTS

**Greentree Modules:** Accounts Receivable, eReporting

**Associated Apps:** 010010 Email Copy Invoices

## USER INSTRUCTIONS

### PRINT INVOICES

| Reports | Accounts Receivable | Invoices

1. Open the AR Invoice report as per standard functionality. This app works when you use the eReporting module to Output report to Auto fax/email/print on invoices.

The screenshot shows a software dialog box titled "Print Report: AR Invoices - DN". It contains several sections for configuring the report printout:

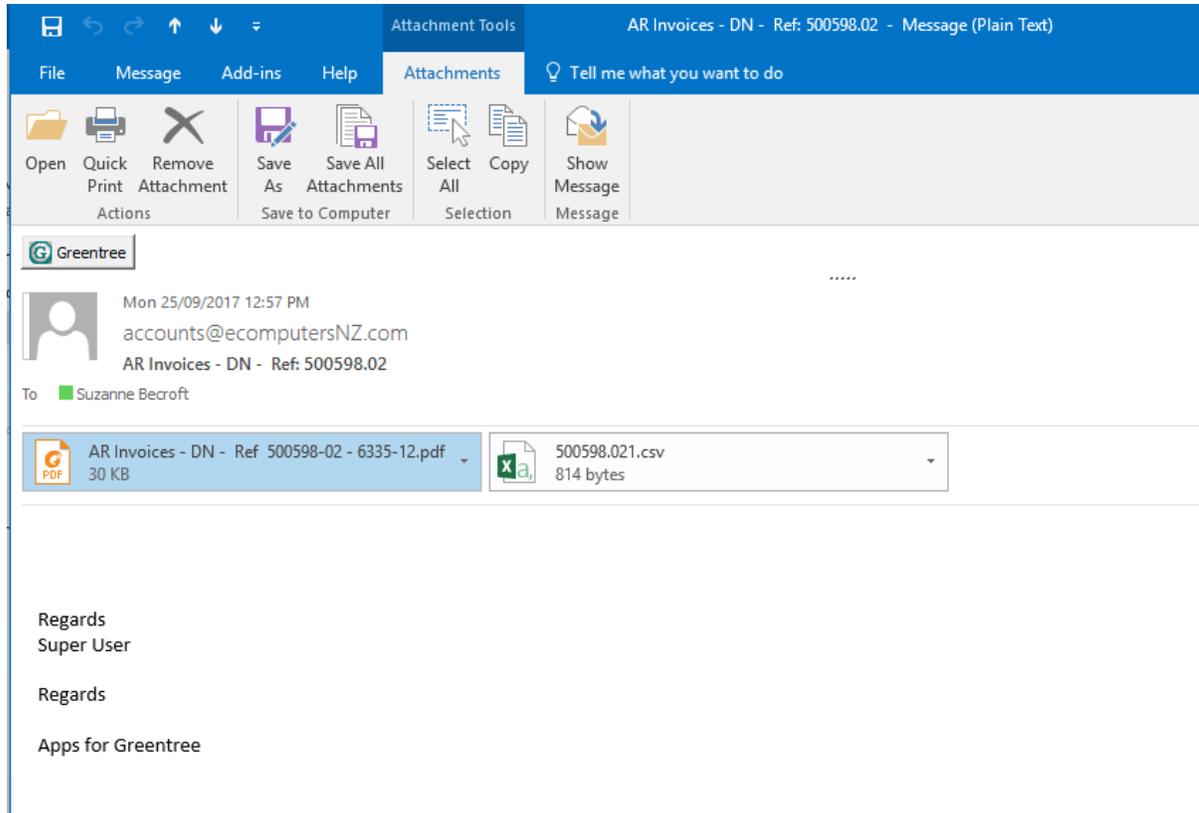
- Select profile:** Batch Number/Entered Order
- Security view:** All
- Set parameters:** A table with the following data:

Parameter	Value
Batch From	0
Batch To	999999
Invoice From	500598.02
Invoice To	500598.02
Invoice list	
Reprint Invoices?	<input type="checkbox"/>
Print Invoices on Hold ?	<input type="checkbox"/>
Print Copy Only?	<input type="checkbox"/>
Print Line Item?	<input checked="" type="checkbox"/>
Print Line Total?	<input checked="" type="checkbox"/>
Customer Code From	
Customer Code To	zzzzzzzzzzzz
Invoice Posting Date From	01/01/1950
Invoice Posting Date To	31/12/2050
- Set trees for:** (Empty dropdown)
- Main tree:** (Empty dropdown) with a "Set Branches" button.
- Selection trees:** (Empty dropdown) with a "Change" button.
- Output report to:** Auto fax/email/print
- Printer to use:** Printers
- Print As:**  Text,  Graphics,  Show Definition

At the bottom, there are five buttons: Save Selection, Preview, Quick Print, Print, and Cancel.

2. Enter the criteria for the invoices you want to send and click **Print**.

3. The invoice will be emailed to the Invoice recipient address on the Customer Maintenance as per standard functionality. In addition, it will also have the csv file attached. The csv file will be formatted per the interface you selected for the customer.



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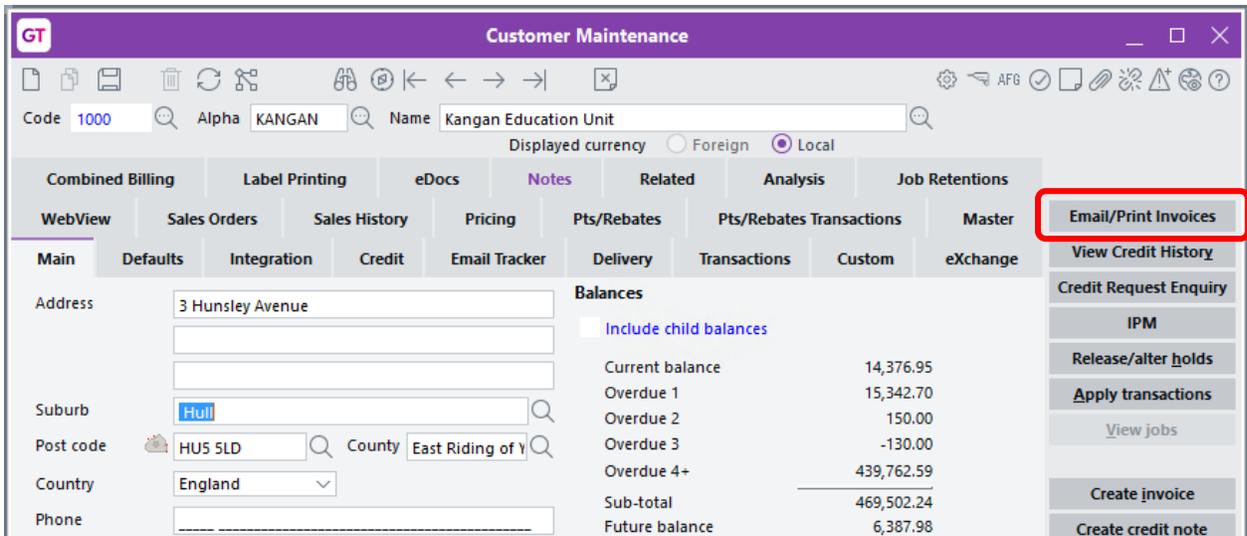
## EMAIL COPY INVOICES

| [Data Entry](#) | [Accounts Receivable](#) | [Customer Maintenance](#)

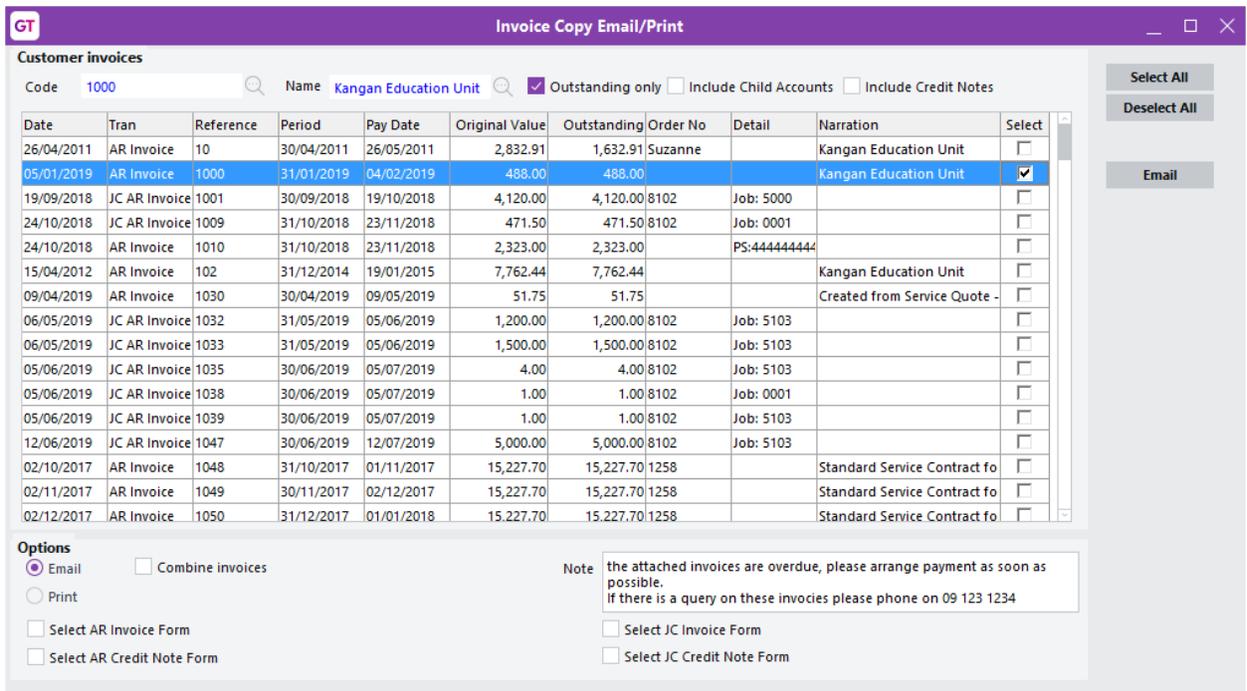
Or

| [Enquiry](#) | [Accounts Receivable](#)

If you have app 010010 Email Copy Invoices, you can email multiple invoices and the associated csv file using that App.



1. Select your customer, then click on the **Email/Print Invoices** button.



2. Select the invoices and format as described in the instructions for the Email Copy Invoices app, then click **Email**.

**GT** Email entry form

To: accounts@customer.com

Cc:

Bcc:

Subject: e-Computers - NZ. Customer:Kangan Education Unit Copy Invoice/s

the attached invoices are overdue, please arrange payment as soon as possible.  
If there is a query on these invociies please phone on 09 123 1234

Regards  
Super User  
Call 26848

Regards  
Apps for Greentree

File Name	File Path	File Size
1000_Copy1		63.8K
10001.csv		295

**Add Attachment** **Remove Attachment** **Send Email**

3. The email entry form from app 010010 will be displayed and both the pdf of the invoice and a csv file of the invoice will be attached. The csv file will be formatted per the interface you selected for the customer.
4. Click **Send Email**

## 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

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	✓	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	✓	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	✓	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	✓	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	✓	31 December 2099	24-Edit Users	Change	

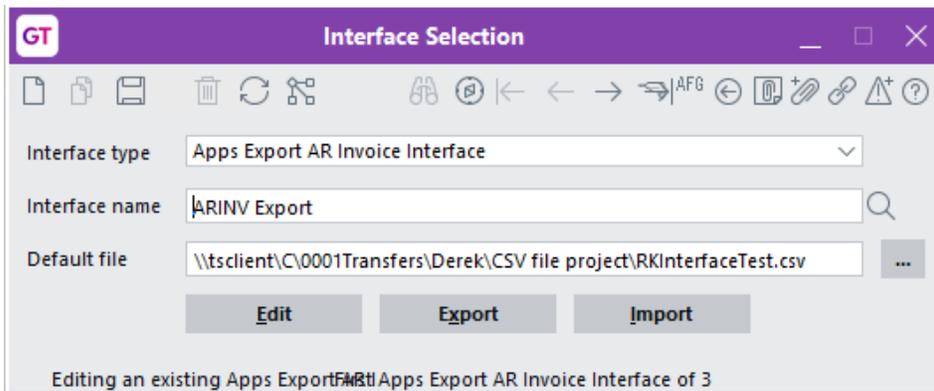
4. Select/Highlight the **AR Invoice Email Interface File** App.
5. Click on the **Edit Users** button and select the users who will be configured to use the AR Invoice Email Interface File App, for which companies.
6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.

### OTHER GREENTREE CONFIGURATION

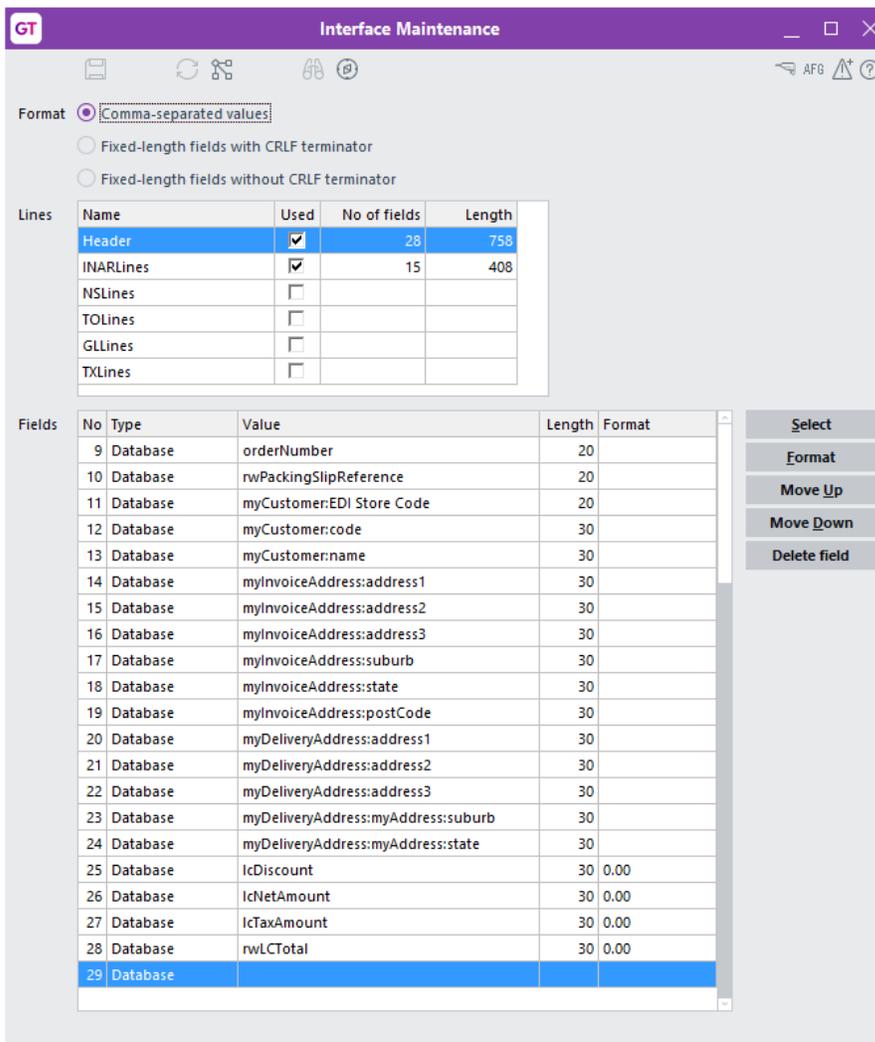
#### INTERFACE MAINTENANCE

| **System** | **System Setup** | **Interface Maintenance**

1. Using interface type **Apps Export AR Invoice Interface**, create the csv layout definition. Your Greentree dealer can assist you with this.



2. Select the blocks for Header and then for each different line type and specify the fields to output for each block.



3. You can have a specific layout for each customer, or you can have a generic one you use for all customers.

## CUSTOMER MAINTENANCE

| Data Entry | Accounts Receivable | Customer Maintenance

1. For Customers with Invoice Delivery Method "Email", select the Export Interface from the drop-down. The Customer must have an Invoice Delivery Method of email and a valid email address against Invoice recipient.

The screenshot displays the 'Customer Maintenance' window for 'Kangan Education Unit'. The 'Reporting options' section is highlighted with a red box, showing the following configuration:

Invoice delivery method	Email	Export Interface	ARINV Export
Invoice recipient	accounts@customer.com		
Statement delivery method	Email		
Statement recipient	accounts@customer.com		
Receipt delivery method	Email		
Receipt recipient	sonia@verde.co.nz		

Other visible fields include:

- Branch: 03 (Christchurch)
- Currency: NZD (New Zealand Dollars)
- Calendar: MARCH
- Payment terms: 30 Days from Invoice Date
- Salesperson: Sally Scoresby (SSC) (SCORES)
- Receipt type: Cheque
- Invoice discount: 0.00 %
- Statement discount: 0.00 %
- Interest code: N/A (0.00%)
- Advance receipt: 0.00 %
- Order No required:
- Order No must be unique:
- Hotprint invoice form: AR Invoices - L
- Print discount:
- Print overdue messages on statements:
- Print notes on invoices:
- Print zero supplied order lines on invoice:
- Single attachment per eReporting email:

The status bar at the bottom indicates 'Editing an existing customer' and 'customer 10 of 1863'.

## APP CONFIGURATION

Not required for this App.