Apps for
Greentree

AR INVOICE EMAIL INTERFACE FILE

APP NUMBER: 010115

Powered by:

MYOB Greentree

TABLE OF CONTENTS

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.

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.

OTHER REQUIREMENTS

Greentree Modules: Accounts Receivable, eReporting

Associated Apps: 010010 Email Copy Invoices

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.

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.
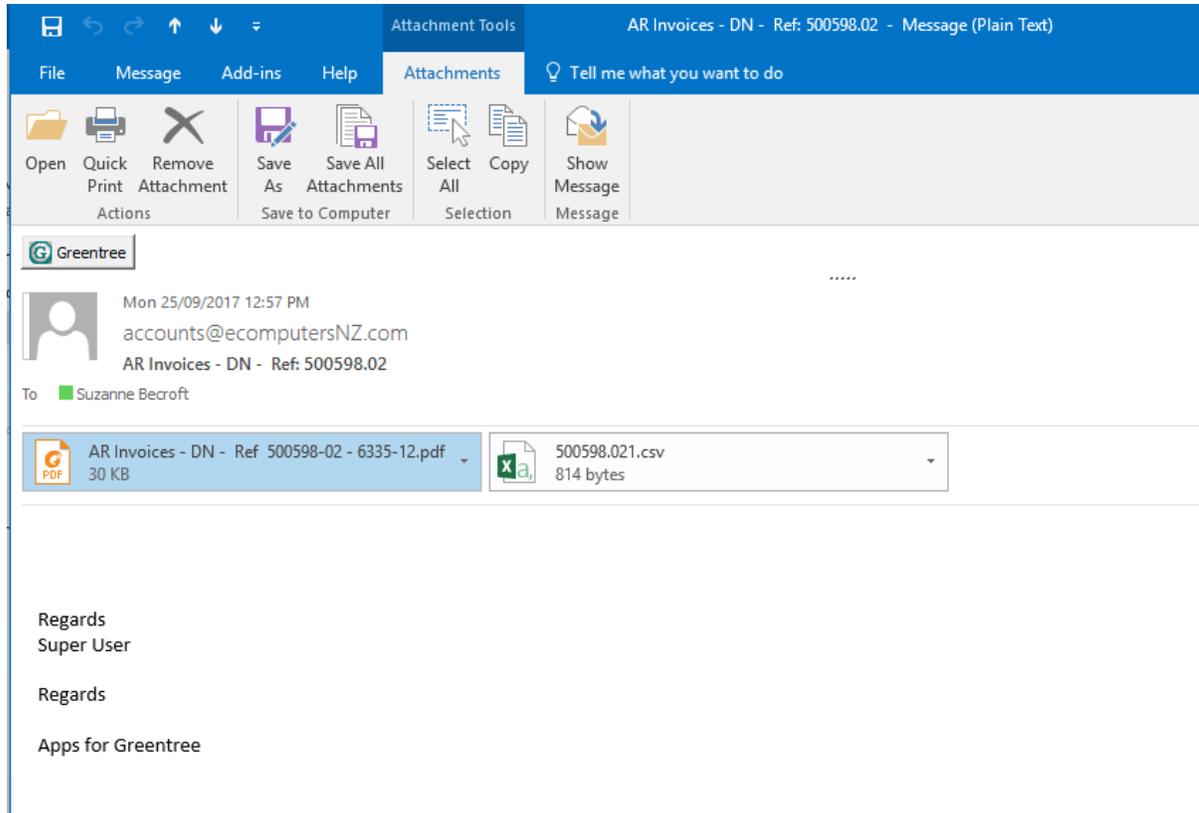
EMAIL COPY INVOICES

| 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.
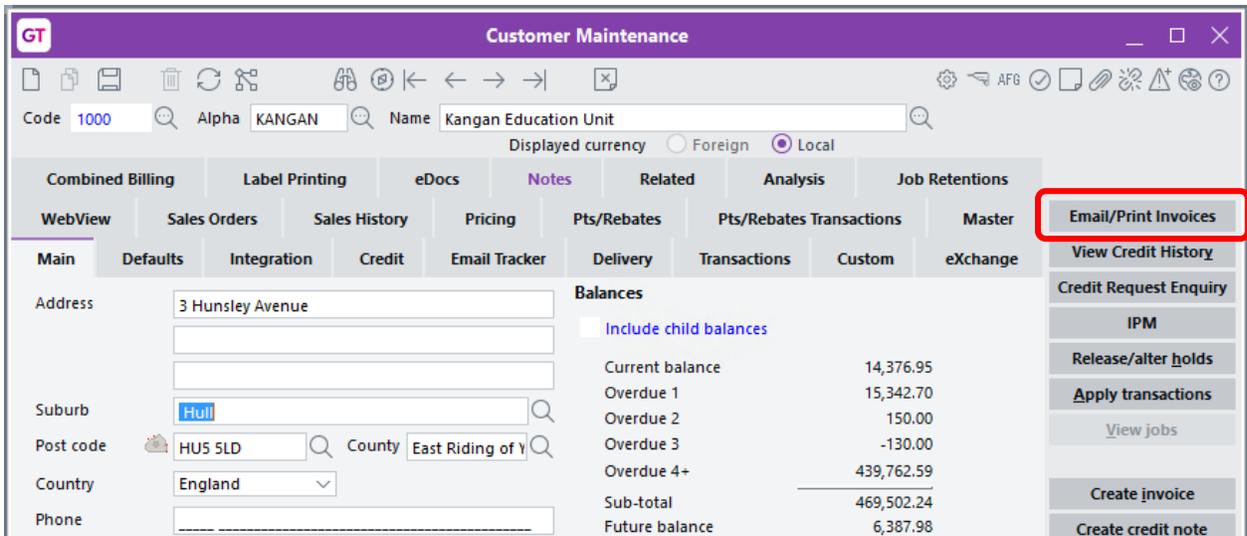
1. Select your customer, then click on the Email/Print Invoices button.
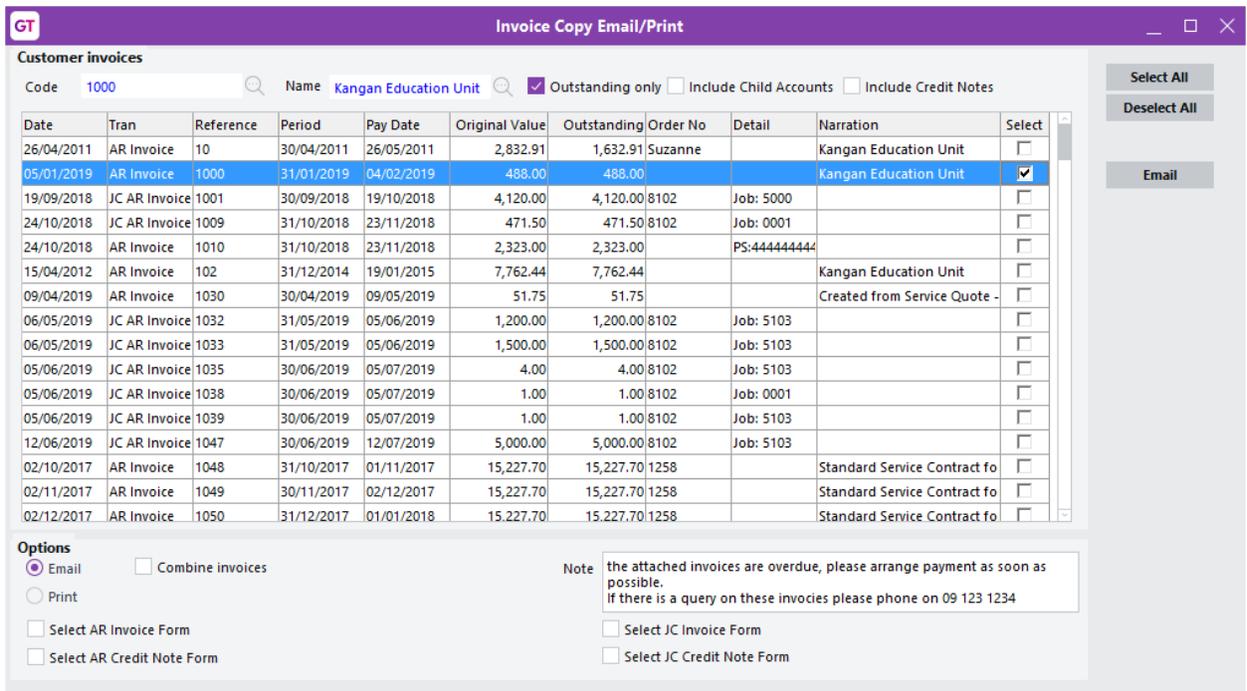
2. Select the invoices and format as described in the instructions for the Email Copy Invoices app, then click Email.

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 invocies 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

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.
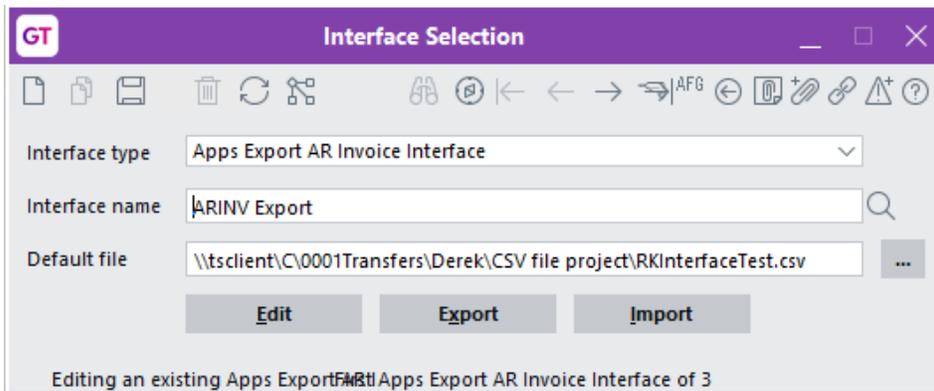
2. Select the blocks for Header and then for each different line type and specify the fields to output for each block.
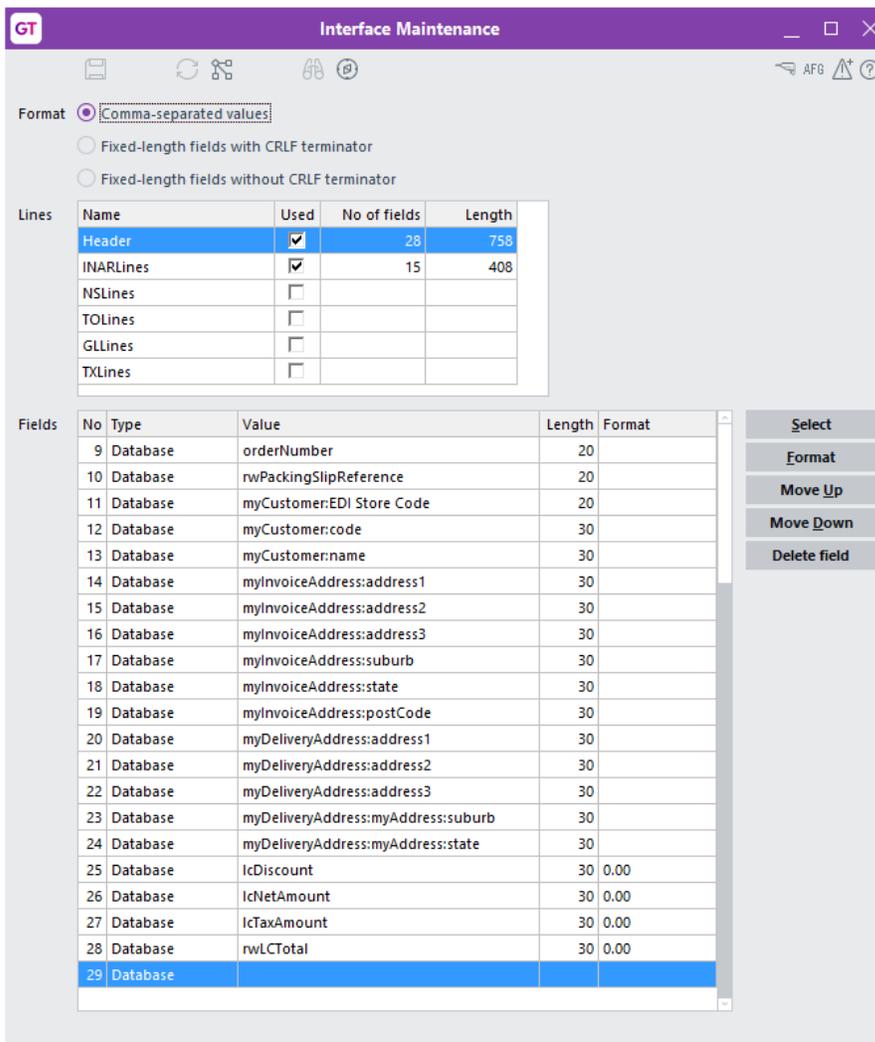
3. You can have a specific layout for each customer, or you can have a generic one you use for all customers.

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.

APP CONFIGURATION

Not required for this App.