

VERSION 2.0
JUNE 20, 2017

Apps for Greentree

CRM ASSET RELATED MAINTENANCE

APP NUMBER: 010121

Powered by:

MYOB Greentree

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FEATURES

1. **Allows visibility of maintenance requirements on related physical assets.**

Physical assets with maintenance cycles frequently have related assets and it may be preferable to do the maintenance on those assets at the same time.

When reviewing specific asset maintenance cycles, this App allows you to drill-in to see other related maintenance due for that asset or any sub assets (components/subcomponents).

2. **Print maintenance documents**

This app will create service requests for all selected maintenance cycles and also print documents attached to the assets – this can include instructions for performing a service or replacing a part.

If A&A rules are enabled they can be configured to update alert collections prior to or when maintenance is due.

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:

CRM Assets, Scheduled Maintenance, CRM Service, Alerts and Approvals (Recommended)

Associated Apps:

USER INSTRUCTIONS

Maintenance cycles need to be assigned to CRM Assets per standard functionality.

Recommend an Alert rule is setup to populate a collection of maintenance cycles when they become due or with a lead time. This is standard Greentree functionality and instructions are not included here.

GENERATE SERVICE REQUESTS FOR PHYSICAL ASSET MAINTENANCE CYCLE

| CRM | Asset Management | Physical Assets

From within physical Asset maintenance, you can click on the Maintenance tab, then drill into a maintenance cycle for that asset. If you have configured an alert collection, when the alert appears on the desktop double click to go to the Maintenance Cycle.

When editing or viewing a Maintenance Cycle against an Asset this App provides a Related Maintenance button.

The screenshot shows the 'Maintenance Cycle' application window. The title bar includes a search icon, a save icon, a refresh icon, a settings icon, and a magnifying glass icon. The window contains the following fields and controls:

- Code:** ADMES600Serv
- Name:** Service 600Hrs
- Schedule Type:** Service
- SV Group:** (empty)
- SV Person:** (empty)
- SV Type:** (empty)
- Template:** (empty)
- Job:** (empty)
- Start Time:** 0:00 AM
- Buttons:** Copy Template, Inventory, Related Maintenance
- Radio Buttons:** Time Based, Usage Based
- Frequency:** Every 6000.0000 Hours
- Next Due:** 1000.0000
- No of days history for Maintenance Cycle predictions:** 0
- Method of incrementing next due:** Add interval to last due, Add interval to last actual reading
- Schedule Type Detail:** Change Text
- Service Work to be Done:** To conduct Scheduled service on site
- Estimated Values:**

Travel Time	2.00	Time Cost	40.00	Time Sell	80.00
Service Time	1.00	Other Cost	20.00	Other Sell	40.00

Click on the Related Maintenance to see other maintenance cycles that have been configured for this asset.

Asset	Description	Maintenance Cycle	Next Due	Expected	Current	Select
1075	AD Main Engine starboard 13011	Service 600Hrs	1000.0000	2045.0000	1500	<input type="checkbox"/>
1050	AD Turbochargers	6,000 Hours AD Turbo Charger C	1000.0000	138157.0000	1793	<input type="checkbox"/>
1060	AD cylinder Heads	6000 Hr Inspection ADMES Cylin	500.0000	2089.0000	1816	<input type="checkbox"/>

When the screen is presented it will only have the parent item.

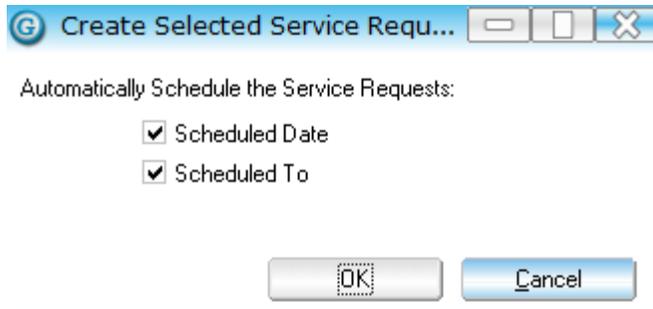
Click Include Sub-Components and Apply to also display maintenance cycles against sub assets.

The Next Due column displays the usage when the cycle would next be due to be actioned, the Current column displays the current usage. Expected is based on a dynamic property against a CRMSV Maintenance Cycle (your Greentree reseller will need to set this up).

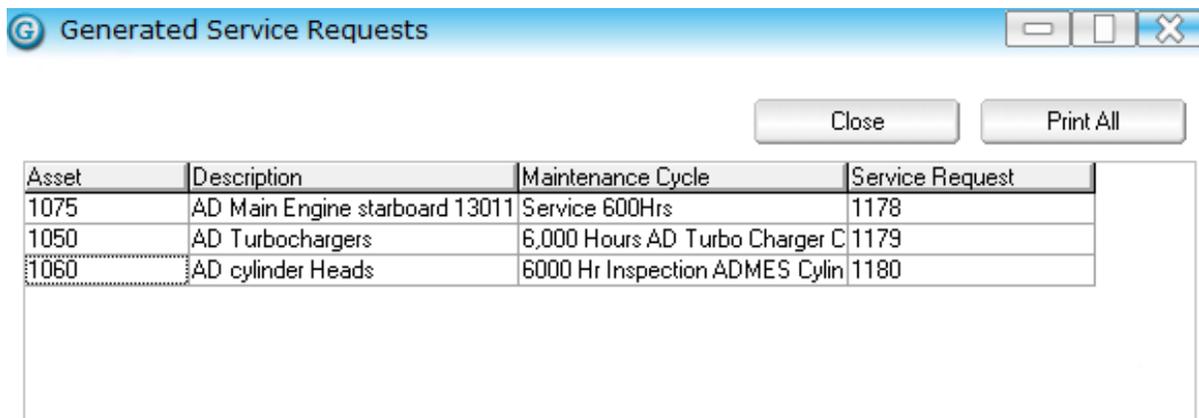
The cycles can be viewed by double clicking on them.

Select the cycles you wish to action at this time.

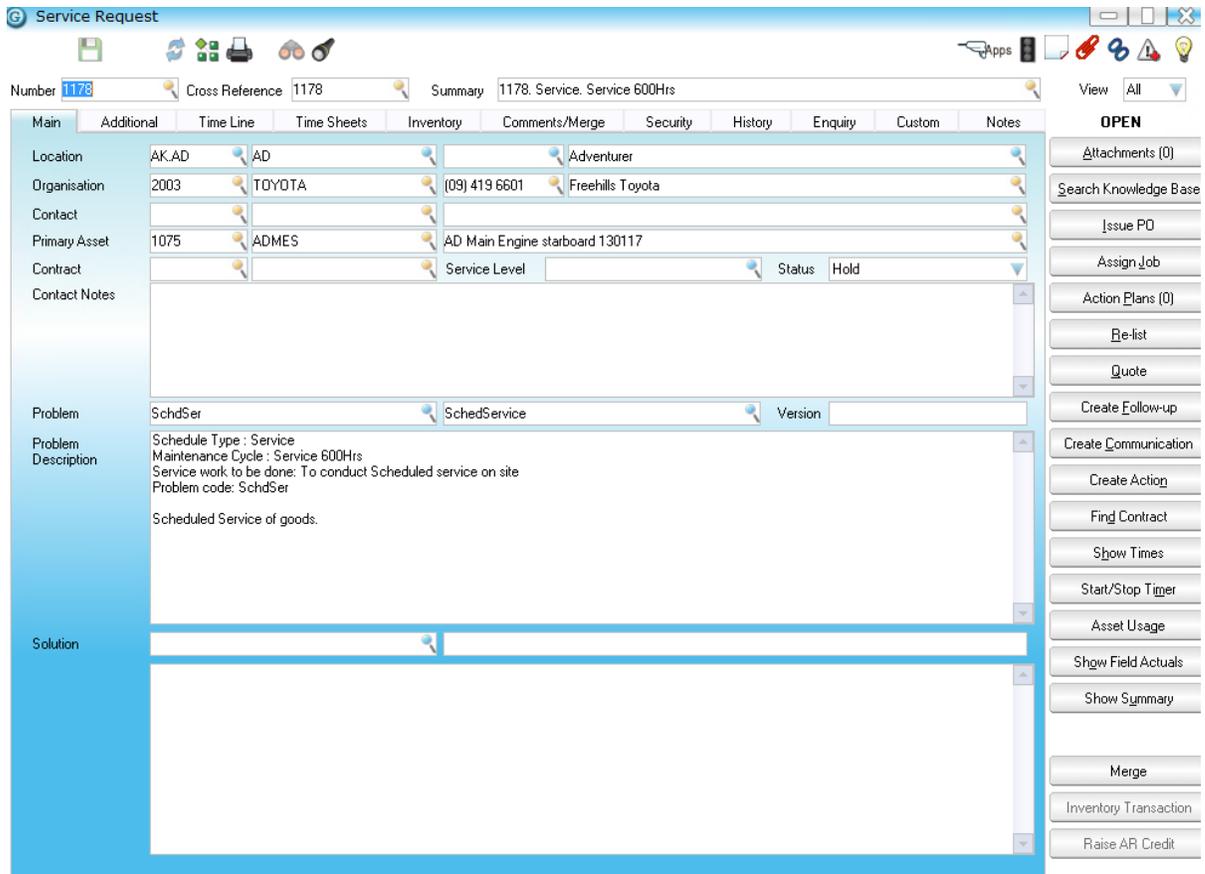
Click the Generate button to generate Service Requests for the selected cycles.



Click OK on this message (standard Greentree).



Three separate Service Requests have been generated relating to the maintenance cycles selected.



The service requests have the details of the cycle and the work to be done. The service request is then processed per standard procedure.

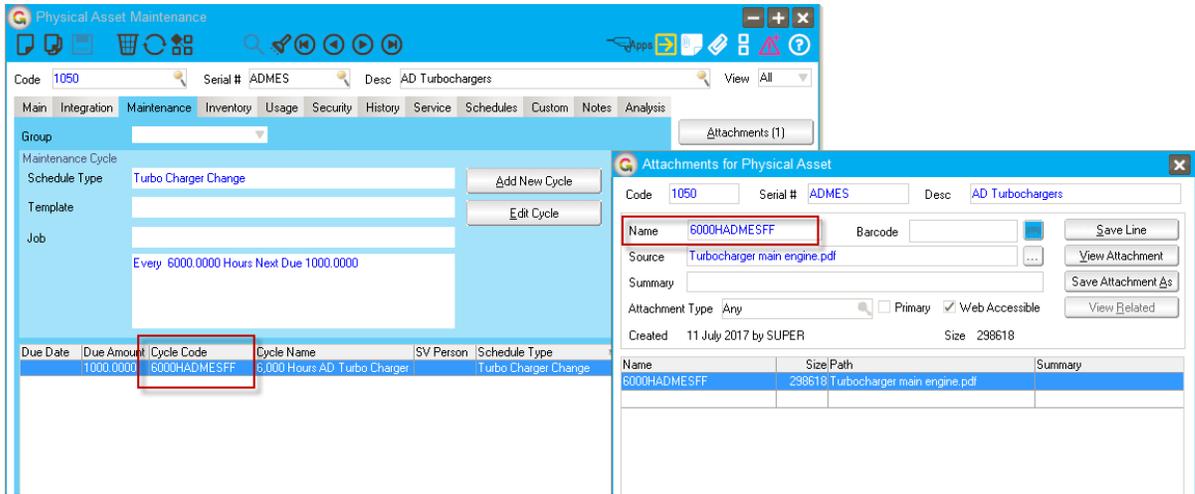
PRINT SERVICE REQUESTS DOCUMENTS

Maintenance cycles often include a set of defined tasks/services being performed.

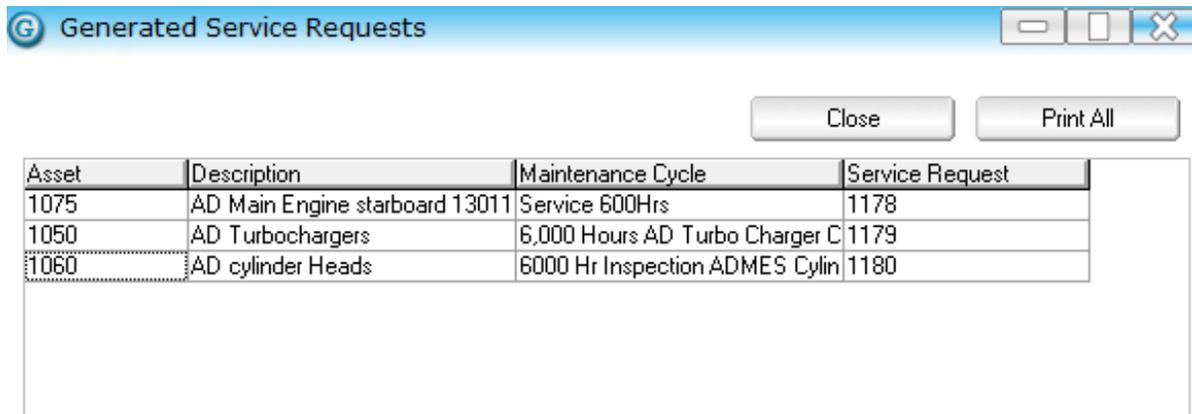
This app also includes the ability to print those related instructions at the time the service request is generated.

| CRM | Asset Management | Physical Assets

CRM Physical Assets have an Attachment button or you can use the Attachment icon at the top of the screen



Save the instruction document as an attachment where the name is the same as the Maintenance Cycle code



Once you have generated the service requests from the Related Maintenance screen, click the Print All button on the Generated message screen.

This will print;

1. a summary of the generated service requests
2. Service Forms (as specified in CRM module control on the Service tab) for the service requests generated
3. Documents attached to the asset with the same name as the maintenance cycle code

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 **CRM Asset Related Maintenance** 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.

GREENTREE CONFIGURATION

Not required for this App.

APP CONFIGURATION

Not required for this App.