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.

G Maintenance	e Cycle		
	🧭 🚼 🛛 🐽 d	1	
Code ADMES600S	erv 🔍 Name Service 600	DHrs	٢
Schedule Type Servic SV Group SV Person	e V	Template Job Start Time 0:00 AM	Copy Template Copy Template Inventory Related Maintenance
SV Type O Time Based	<ul> <li>Usage Based</li> </ul>		
Every 6000.0 No of days hist Method of incr Add interv • Add interv	000 Hours ory for Maintenance Cycle predictio ementing next due ral to last due ral to last actual reading	Next Due 1000.0000	
Schedule Type Deta	il Change Text		
Service Work to be Done	To conduct Scheduled service	on site	*
Estimated 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.

🕝 Relat	ed Maintenance					
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Code	1075				A	ply
Location	AK.AD				Gen	ierate
	✓ Include Sub Components	Select All Desele	ect All			
Asset	Description	Maintenance Cycle	Next Due	Expected	Current	Select
1075	AD Main Engine starboard 13011	Service 600Hrs	1000.0000	2045.0000	1500	
1050	AD Turbochargers	6,000 Hours AD Turbo Charger C	1000.0000	138157.0000	1793	
1060	AD cylinder Heads	6000 Hr Inspection ADMES Cylin	500.0000	2089.0000	1816	

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.

🌀 Create Selected Service Requ 🗖 🗌 🔀								
Automatically Schedule the Service Requests:								
Scheduled Date								
Scheduled To								
OK Cancel								

Click OK on this message (standard Greentree).

G Generated Service Requests 83 Close Print All Maintenance Cycle Service Request Asset Description 1075 AD Main Engine starboard 13011 Service 600Hrs 1178 1050 6,000 Hours AD Turbo Charger C 1179 AD Turbochargers 1060 AD cylinder Heads 6000 Hr Inspection ADMES Cylin 1180

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

G Service Reque	st	
	🖉 🏦 🖨 🛷 🕑	- 🔗 🕱 🔬 💡
Number 1178	Reference 1178 Reference 1178 Summary 1178. Service. Service 600Hrs	View All 🔍
Main Addition	nal Time Line Time Sheets Inventory Comments/Merge Security History Enquiry Custom Notes	OPEN
Location	AK.AD 🔍 AD 🔍 🥄 Adventurer 🔍	Attachments (0)
Organisation	2003 🍳 TOYOTA 🍳 (09) 419 6601 🍳 Freehills Toyota 🍳	Search Knowledge Base
Contact		Issue PO
Primary Asset	1075 ADMES AD Main Engine starboard 130117	Assian Job
Contract Contact Notes	Service Level Status Hold	Astian Plans (0)
00110001110100		
		<u>H</u> e-list
		Quote
Problem	SchdSer 🔍 SchedService 🤍 Version	Create <u>F</u> ollow-up
Problem	Schedule Type : Service Maintenance Ducker: Service 600Hrs	Create Communication
Description	Service work to be done. To conduct Scheduled service on site Problem code: SchdSer	Create Actio <u>n</u>
	Scheduled Service of goods.	Find Contract
		S <u>h</u> ow Times
		Start/Stop Timer
	×	Asset Usage
Solution	Y	Show Field Actuals
		Show S <u>u</u> mmary
		Merge
		Inventory Transaction
	v	Raise AR Credit

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

0	Physical Asset	t Maintenanc	e Qş	\$⊌⊙(	•			_	Apps	<b>)</b>	×+− ⑦ <u>♪</u> 8 《	l			
C	ode 1050	2	Serial # ADMI	es 🔍	Desc AD Turbo	chargers				2	View All 🔍				
	Main Integration	Maintenance	Inventory Us	age Security	History Service	Schedules	Custom	Notes	Analysi						
	Group		V							≜t	tachments (1)	J			
	Maintenance Cycle								G Att	chments	for Physical As				×
	Schedule Type	Turbo Charge	er Change			<u>A</u> dd N	lew Cycle		Carda	1050	Codel #	ADMES	Dava AD Turb	obvoor	
	Template					Ed	it Cycle		Code	1030	Selial #		Desc Ab Tub	Jonargen	·
	Job					· · · · · · · · · · · · · · · · · · ·			Name	6000H	IADMESFF	Barcode			<u>S</u> ave Line
		Every 6000.0	0000 Hours Next	Due 1000.0000	)				Source	Turbo	charger main engin	e.pdf			View Attachment
									Summa	ry					Save Attachment As
									Attach	nent Type	Any	O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O     O	rimary 🛛 🗹 Web Acces	sible	View <u>R</u> elated
		-							Create	i 11 Julj	2017 by SUPER		Size 298618		
	Due Date Due Am	iount Cycle Coc	ie Cycl MESEE S.00	e Name 0 Hours AD Turk	SV Per	son Schedule	Type	10	Name		9	ize Path		Sum	mary
	1000.00		0,00		bo chaiger	Tubo ch	arger enang	,c	6000HA	DMESFF	298	618 Turbocharger n	nain engine.pdf		
		_													

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

		ſ	Close	Print All
		lu :		
Asset	Description	Maintenance Lycle	Service Rei	quest
075	AD Main Engine starboard 13011	Service 600Hrs	1178	
050	AD Turbochargers	6,000 Hours AD Turbo C	harger C 1179	
060	AD cylinder Heads	6000 Hr Inspection ADM	ES Cylin 1180	

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

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Eriter N	ew Registration Code	Instal Ac	P ]	Delete Inactive/Exp	pired Apps	Uninstall Apps	For Greentree
Code	Name	Description	Active	Expiry Date	User Count	Settings	
000000	Apps For Greentree Form	App Usage information on Forms	P	31 December 2099	0-Edit Users	1	
010002	IN Reorder Workbench	Inventory Reorder Workbench		07 August 2013	24-Edit Users	Change	
010008	Utility System Scripts	A collection of useful scripts for importing and ex	PC 🔽	07 August 2013	24-Edit Users	1	
010012	IN Pricing Workbench	Inventory pricing workbench	1	29 July 2013	24-Edit Users		
010013	Copy GL Journal	Allows copying of a GL Journal on the GL Journ	VI le	01 August 2013	24-Edit Users		
010026	Points	Points Module to add Points for Customer Sales	Г	03 August 2013	24-Edit Users	Change	
010030	Int C. Auth de New Accelle	Description to altern 181 C. Anthene Here Accelebrate	<b>F</b>	34 1.4. 3013	OF ALL		

- 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.

Ġ GApp Mana	ger App User Access				- + ×
	088	Q 🖋		<b>Ð</b> 🦳	🖉 🖁 🕂 🕐
User Count Limit	þ120				
User	e-Computers - Australia	(le-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK
All Users					
ADMIN	<b>V</b>				
Amanda Algar	<b>V</b>	Г			
Angela Allen	<b>V</b>	Γ			
April Aston	<b>V</b>	Г			
Cameron Cook	<b>V</b>	Г		V	
Chelsea Cork	<b>V</b>	Г			

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.