Apps for
Greentree

CRM SERVICE REQUEST EMAIL ATTACHMENTS

APP NUMBER: 010125

Powered by:

MYOB Greentree

TABLE OF CONTENTS

FEATURES

1. **CRM Service Request Email including Attachments**

   This app gives you the ability to add attachments to an emailed Communication from a Service Request.

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 Service & Support

Associated Apps: None

SENDING A COMMUNICATION

The App adds the ability to send attachments with a communication entered on a Service request.

| CRM | Service & Support | Service Request
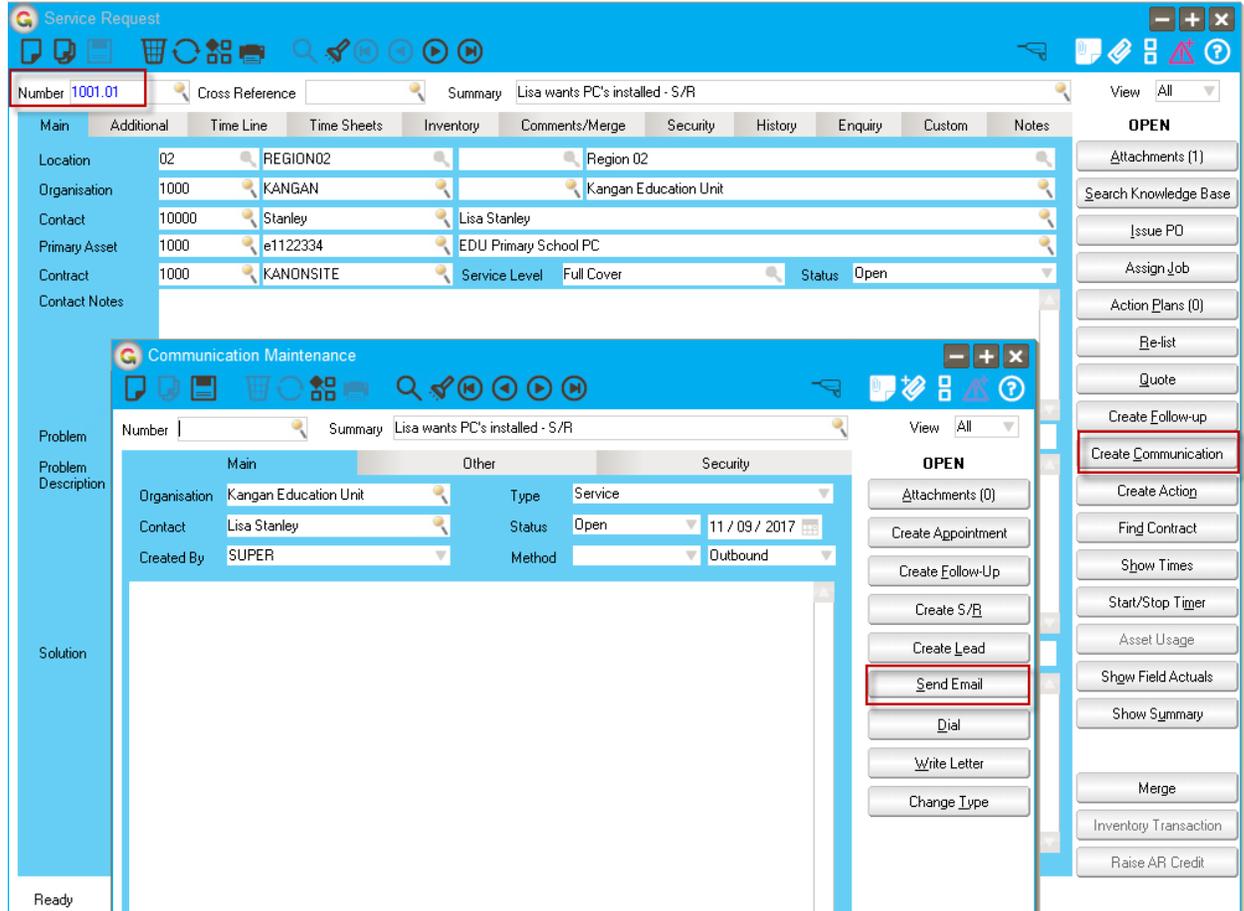
Bring up your Service request and click the Create Communication button.

Then click Send Email
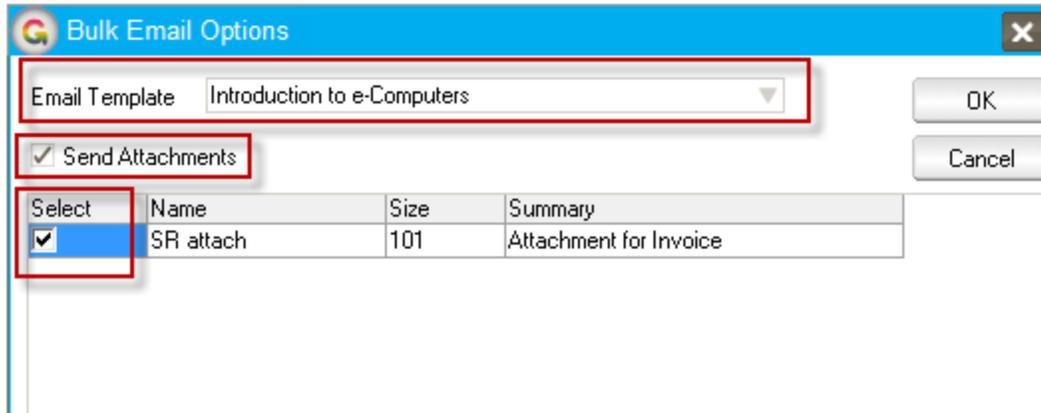
You can optionally select an Email Template

Then tick the Send Attachments checkbox

Select the attachments to Include

Click OK
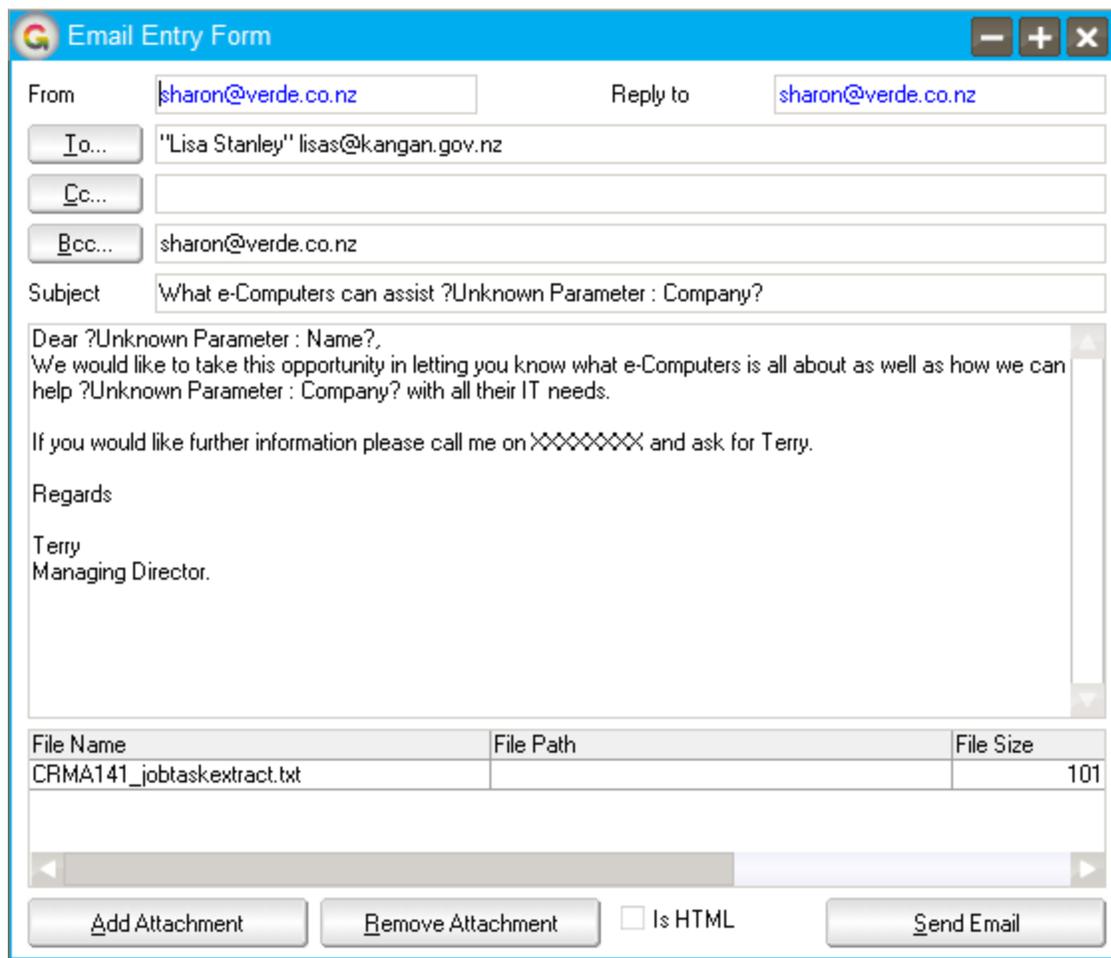
The Email form is displayed with the details from your template and the attachment shown

Edit as required

Click Send Email.

If you don't select an Email Template, then the above Email Entry Form is blank and you can type whatever message is required.

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
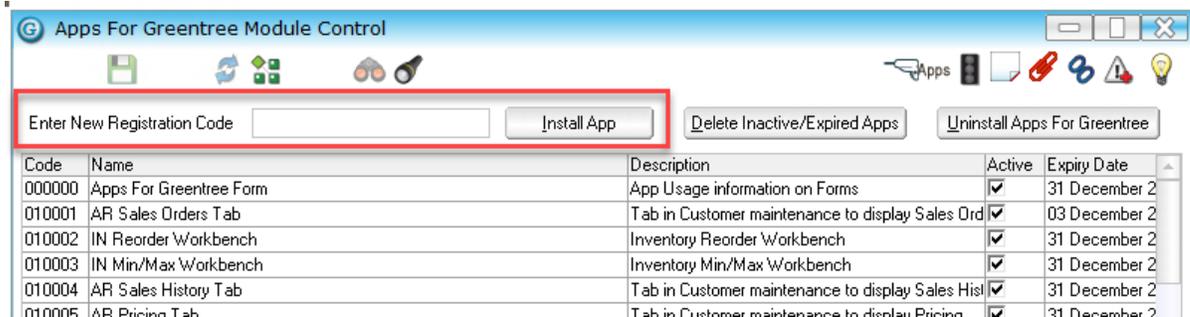
4. Select/Highlight the CRM Service Requests Attachments on Communication Email App.
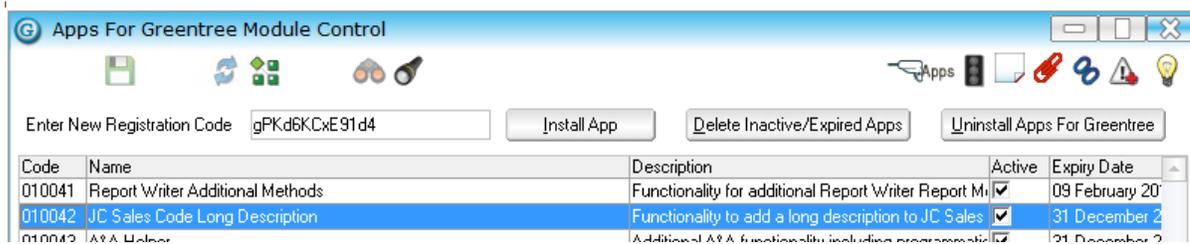
5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.
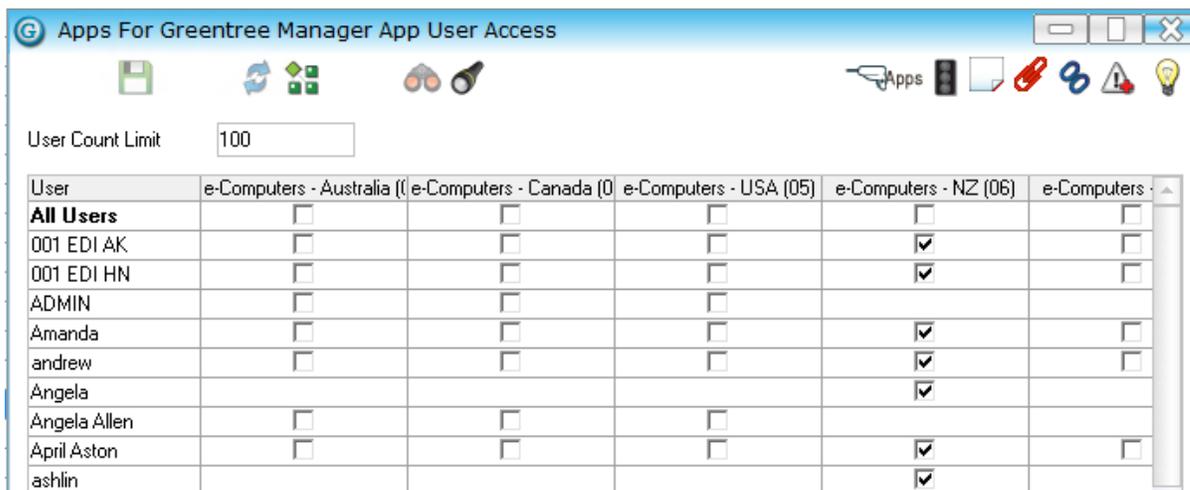
6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.

7. Save and Close the form.

GREENTREE CONFIGURATION

| CRM | Service & Support | Service Request

Add your attachments to your Service Request by clicking on the Attachments button or icon.

Complete the Name and Summary fields, then browse for your attachment.

Save Line.

Click OK.

Email templates are configured under the Email Template Maintenance per standard Greentree Help.