

VERSION 1.0
SEPTEMBER 11, 2017

Apps for Greentree

CRM SERVICE REQUEST EMAIL ATTACHMENTS

APP NUMBER: 010125

Powered by:

MYOB Greentree

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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

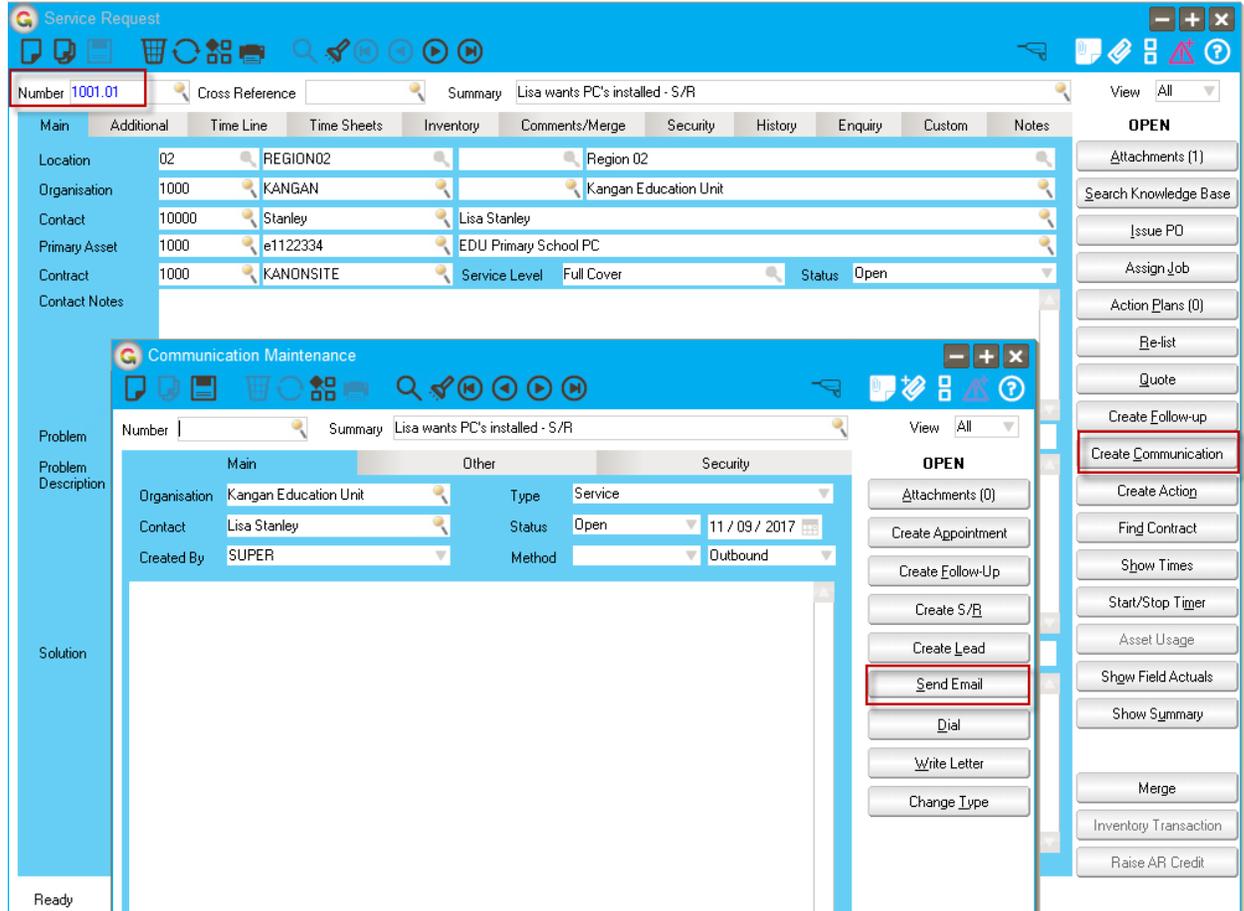
Associated Apps: None

USER INSTRUCTIONS

SENDING A COMMUNICATION

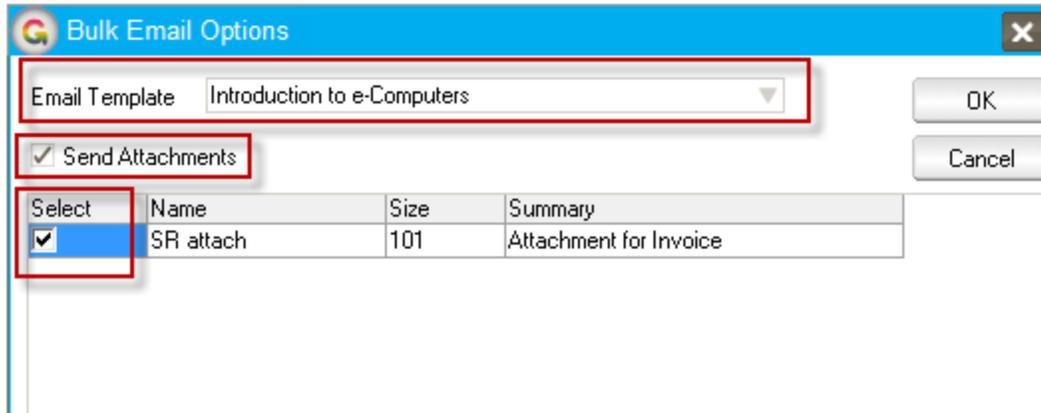
The App adds the ability to send attachments with a communication entered on a Service request.

| CRM | Service & Support | Service Request

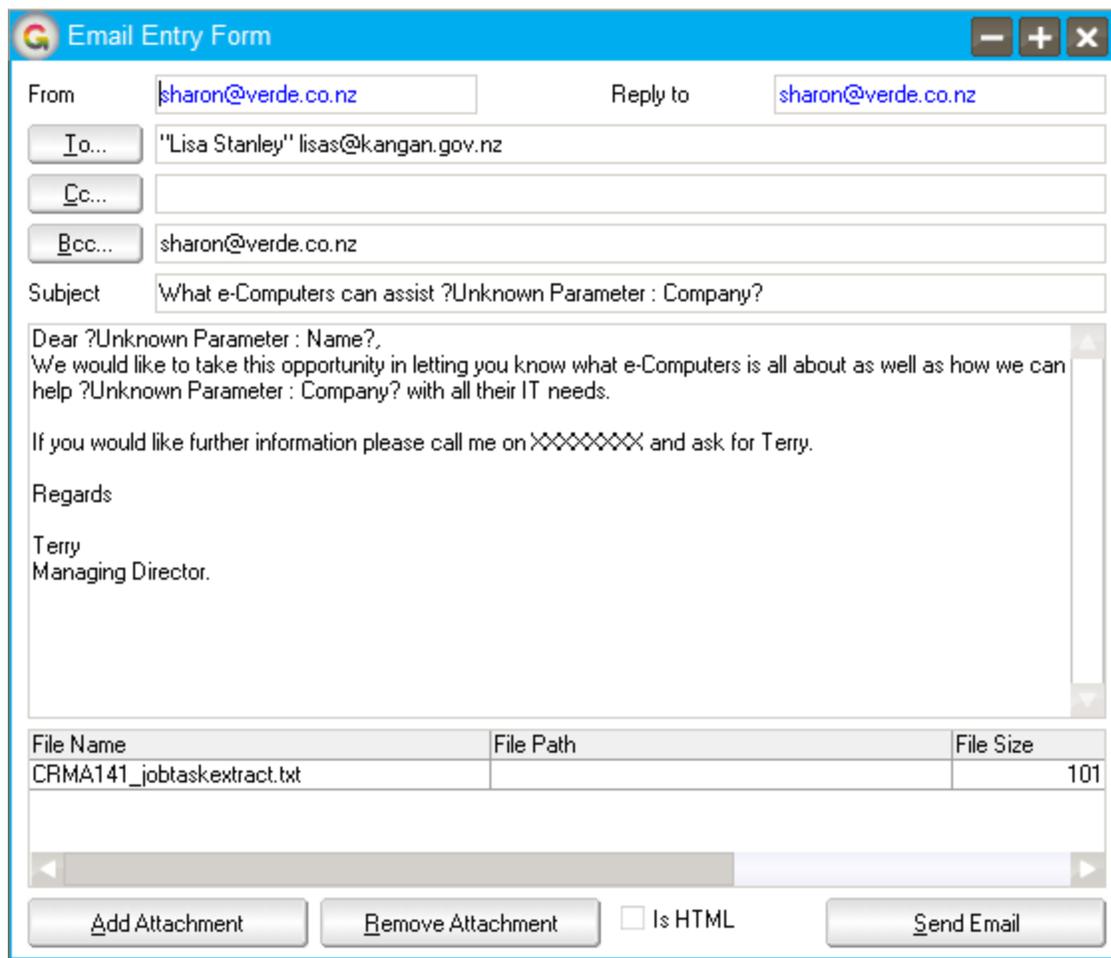


Bring up your Service request and click the **Create Communication** button.

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](#).

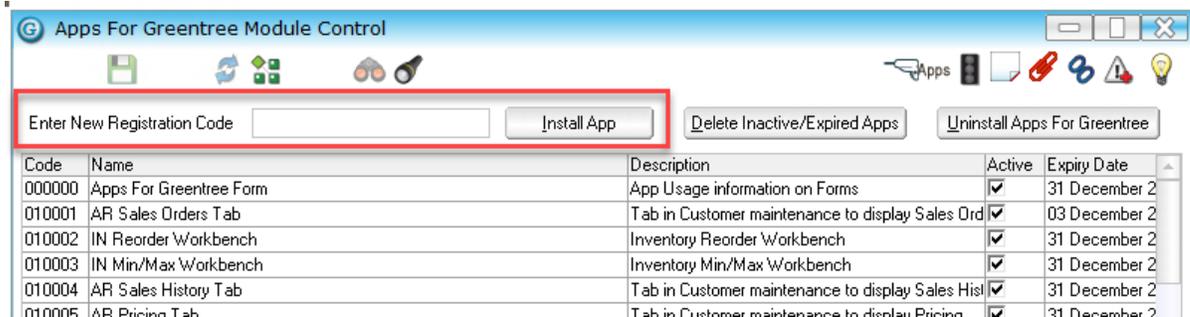
If you don't select an Email Template, then the above Email Entry Form is blank and you can type whatever message is required.

IMPLEMENTATION GUIDE

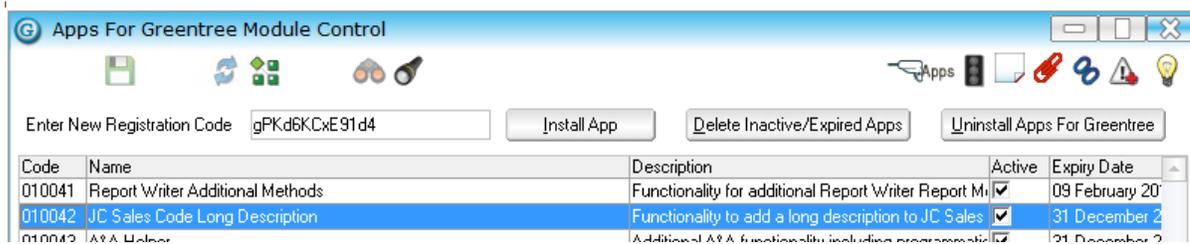
Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

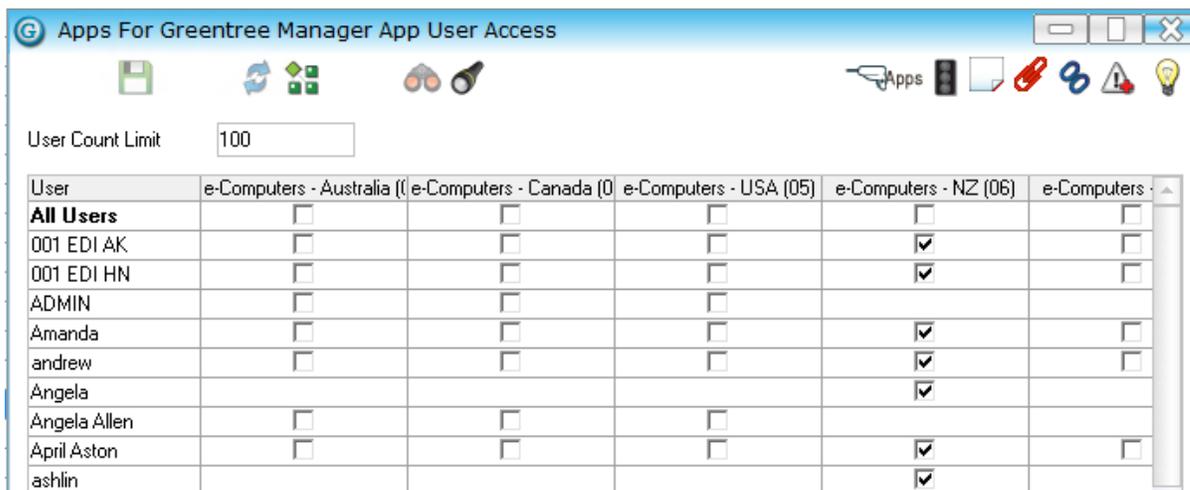
1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** | 3.
Enter the New Registration Codes supplied and click Install App



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

The screenshot displays the 'Service Request' form in the Greentree CRM. The main form is titled 'Service Request' and shows details for request number 1001.01. The summary is 'Lisa wants PC's installed - S/R'. The form is divided into several tabs: Main, Additional, Time Line, Time Sheets, Inventory, Comments/Merge, Security, History, Enquiry, Custom, and Notes. The 'Main' tab is active, showing fields for Location (02, REGION02), Organisation (1000, KANGAN), Contact (10000, Stanley, Lisa Stanley), Primary Asset (1000, e1122334, EDU Primary School PC), and Contract (1000, KANONSITE, Service Level Full Cover, Status Open). The Problem section is titled 'Install' and has a description: 'Install Products/Services/Features as requested. Lisa would like PC to be fitted to the New Classrooms ready to be used by 15/2 Tech to ensure has enough cabling to connect all 30 units.' The Solution section is titled 'Install' and has a description: 'Cabling connected PC's installed'. An 'Attachments for Request' dialog box is open, showing a new attachment named 'SR attach' with source 'jobtaskextract.txt' and summary 'Attachment for Invoice'. The dialog has 'Save Line', 'View Attachment', 'Save Attachment As', and 'View Related' buttons. The 'Save Line' button is highlighted with a red box. The 'OK' button at the bottom of the dialog is also highlighted with a red box.

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.

