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

G Service Requ												-+×
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Number 1001.01	Cros	s Reference		R Su	immary Lisa wa	ants PC's installe	ed - S/R				4	👌 View All 🔻
Main Addit	tional Ti	me Line	Time Sheets	Invent	ory Comm	ents/Merge	Security	History	Enqui	ry Custom	Notes	OPEN
Location	02	🔍 REGI	ON02	۹,		🔍 Region 02					۹,	Attachments (1)
Organisation	1000	🔍 KANG	3AN	्		Rangan E	ducation Unit				٩	Search Knowledge Base
Contact	10000	Real Stanle	ву	٩ ا	isa Stanley						्	Issue PO
Primary Asset	1000	e1122	2334	<pre></pre>	EDU Primary Sch	nool PC			. 0-		<	Assian Job
Contract Contact Notes	1000	- NANL	JNSITE	7	Service Level	Full Cover		St St	tatus op	en		Action Plans (0)
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G	Communic	ation Main	itenance							- 86	- ×	<u>H</u> e-list
6	) 🗋 🗐		8 💼	Q \$ (					9	<b></b>	2	Quote
Problem Nu	mber	4	Summary	Lisa wants f	PC's installed - S.	/R			2	View All	V N	Create <u>F</u> ollow-up
Problem		Main	-		Other		Secur	rity		OPEN		Create <u>C</u> ommunication
Description	Organisation	Kangan Edu	ucation Unit	٩	Туре	Service			▼ (	<u>A</u> ttachments (0	))	Create Actio <u>n</u>
	Contact	Lisa Stanley	,	٩	Status	Open	▼ 117	09/2017 📃		Create Appointm	ient	Fin <u>d</u> Contract
	Created By	SUPER			Method		▼ Outb	oound	_ (	Create <u>F</u> ollow-L	Jp	S <u>h</u> ow Times
										Create S/ <u>R</u>		Start/Stop Timer
Solution										Create <u>L</u> ead		Asset Usage
										<u>S</u> end Email		Show Field Actuals
										<u>D</u> ial		Show S <u>u</u> mmary
										<u>₩</u> rite Letter		
										Change <u>T</u> ype		Merge
												Inventory Transaction
												Raise AR Credit
Ready												

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

Then click Send Email

Email Template Introduction to e-Computers				
nents			Cancel	
ne	Size	Summary		
attach	101	Attachment for Invoice		
	nents ne attach	nents ne Size attach 101	nents ne Size Summary attach 101 Attachment for Invoice	

You can optionally select an Email Template

Then tick the Send Attachments checkbox

Select the attachments to Include

Click OK

G Email I	Entry Form		<b>-+</b> ×			
From	sharon@verde.co.nz	Reply to	sharon@verde.co.nz			
<u>I</u> o	"Lisa Stanley" lisas@kangan.gov.r	nz				
<u> <u>C</u>c     </u>						
<u>B</u> cc	sharon@verde.co.nz					
Subject	What e-Computers can assist ?Unknown Parameter : Company?					
Dear ?Unkn We would lil help ?Unkno	Dear ?Unknown Parameter : Name?, We would like to take this opportunity in letting you know what e-Computers is all about as well as how we can help ?Unknown Parameter : Company? with all their IT needs.					
If you would	l like further information please call m	e on XXXXXXXX and ask for 1	Ferry.			
Regards						
Terry Managing D	lirector					
Managing Director.						
			<b>T</b>			
File Name		File Path	File Size			
CRMA141_	obtaskextract.txt		101			
<u>A</u> dd A	Attachment <u>B</u> emove Atta	chment Is HTML	<u>S</u> end Email			

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

G Ap	os For Greentree Module Control					
	💾 🚿 🚼 🊓 🕑 — — — — — — — — — — — — — — — — — —					
Enter New Registration Code						
Code	Name	De	escription	Active Exp	piry Date 🛛 🔺	
000000	Apps For Greentree Form	Ap	op Usage information on Forms	31	December 2	
010001	AR Sales Orders Tab	Ta	ab in Customer maintenance to display Sales Ord	✓ 03	December 2	
010002	IN Reorder Workbench	Inv	ventory Reorder Workbench	31	December 2	
010003	IN Min/Max Workbench	Inv	ventory Min/Max Workbench	✓ 31	December 2	
010004	AR Sales History Tab	Ta	ab in Customer maintenance to display Sales Hist	✓ 31	December 2	
010005	AB Pricing Tab	T =	ih in Customer maintenance to display Pricing	21	December 2	

4. Select/Highlight the CRM Service Requests Attachments on Communication Email App.

G Apps For Greentree Module Control		3
💾 🗳 😫 🐽 🕑		?
Enter New Registration Code gPKd6KCxE91d4	Install App Delete Inactive/Expired Apps Uninstall Apps For Greentree	
Code Name	Description Active Expiry Date	
010041 Report Writer Additional Methods	Functionality for additional Report Writer Report M	-
010042 JC Sales Code Long Description	Functionality to add a long description to JC Sales 🗹 🛛 31 December 2	
010042 ARA Haloar	Additional A&A functionality including programmatic 🖬 21 December 2	

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

a) Apps For Greentree Manager App User Access							
	<i>🖉</i> 🔠	ño 🝼		- Apps 📱 🦳 🕻	୧ ୫ 🛝 💡		
User Count Limit	100						
User	e-Computers - Australia ((	e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers · 🔺		
All Users							
001 EDI AK				V			
001 EDI HN							
ADMIN							
Amanda							
andrew							
Angela							
Angela Allen							
April Aston							
ashlin							

- 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

G Service Reque		
	# 근 # 🖷 🔍 🖋 ® 💿 🕑	
Number 1001.01	Reference Summary Lisa wants PC	s installed - S/R 🔍 View 🛛 All 🔍
Main Additio	onal Time Line Time Sheets Inventory Comments/Me	rge Security History Enquiry Custom Notes OPEN
Location	02 🔍 REGIONO2 🔍 Re	gion 02 Attachments (1)
Organisation	1000 🔍 KANGAN 🥄 🥄 Ka	ngan Education Unit Search Knowledge Base
Contact	10000 🔍 Stanley 🤍 Lisa Stanley	
Primary Asset	1000 Cell22334 EDU Primary School PC	Assign_lob
Contract	1000 KANUNSITE Service Level Full Co	ver Status Upen
Condict Notes		Attachments for Reguest
		Code 1001.01 Alaka Name Line works DC/s installed S/D
		Lode Tout.of Alpha Name Lisa wants PCs installed 57h
		Name SR attach Barcode Save Line
Problem	Install Installation	Bource jobtaskextract.txt View Attachment
Problem Description	Lisa would like PC to be fitted to the New Classrooms ready to be used by 1:	5/2 Bummary Attachment for Invoice Save Attachment As
	recirito ensure has enough cabiling to connect all 30 units.	Attachment Type Any Primary Web Accessible View <u>Related</u>
		Created 11 September 2017 by SUPER Size 101
		Name Size Path Summary
		Shi attachi i ni jubiaskexitaci.txi Attachineri fu myoice
Solution	Install Installed sustem as per ru	
Solution	Cabling connected	
	PC's installed	
Ready		
		<u>D</u> K <u>C</u> ancel

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.

# | CRM | System | Utilities | Email Template Maintenance

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

G Email Temp	olate Maintenance - + >	¢					
🕞 😡 🗐	₩⊖╬	)					
Name Introducti	ion to e-Computers	ŀ,					
	Main						
Subject	What e-Computers can assist ¶Company¶						
Body	Dear ¶Name¶, We would like to take this opportunity in letting you know what e-Computers is all about as well as how we can help ¶Company¶ with all their IT needs.						
	If you would like further information please call me on XXXXXXXX and ask for Terry.						
	Regards						
	Terry Managing Director.						
Auto BCC		1					
Adio Dec	Is HTML format Preview HTML						
Insert Field		1					
Interface	Rield Rield						
	Add to Subject Add to Body						
Ready	First Email Template of 2						