

VERSION 2.0
NOVEMBER 16, 2020

Apps for Greentree

DELETE JC PROFORMAS

APP NUMBER: 010136

Powered by:

MYOB Greentree

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FEATURES

1. Delete JC Proformas

This app gives you the ability to delete All or Selected JC Proformas for the company you are logged into. It is intended for use by sites that create Proformas in bulk and are easily able to re-create them once deleted.

It will typically be used for a site that needs to adjust costs but cannot once the proformas are created. They would use this app to delete the proformas, make the adjustments and then re-generate the proformas.

Note the app only does the bulk delete until on version 2020.5.2.

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: Job Cost

Associated Apps: None

USER INSTRUCTIONS

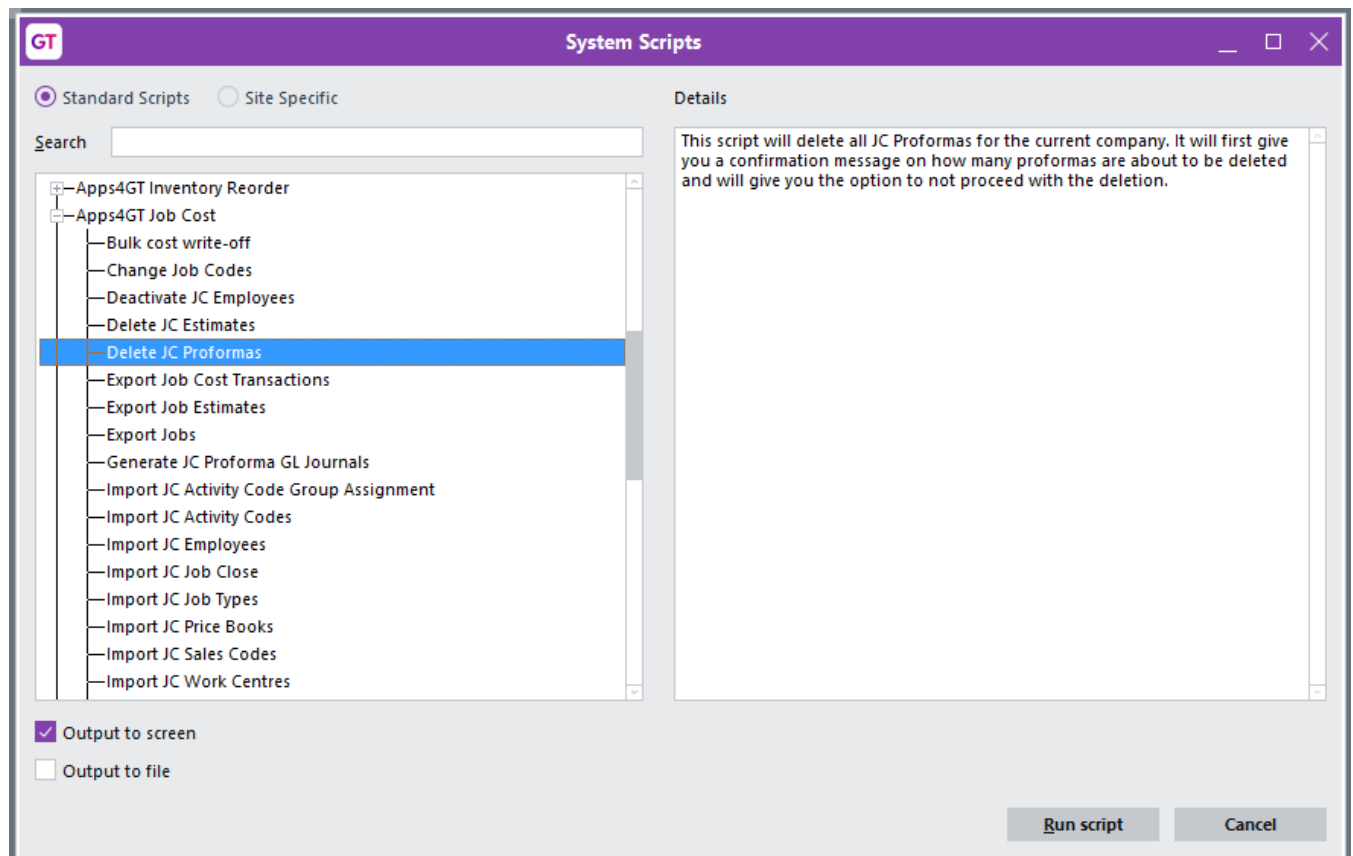
DELETE JC PROFORMAS

The App adds the ability to delete JC Proformas for the current company.

| [System](#) | [Utilities](#) | [System Scripts](#)

Choose the script [Apps4GT Job Cost | Delete JC Proformas](#)

Press [Run script](#)



From Greentree Version 2020.5.2, you have the option to choose either [All jobs](#) or specify different qualifying criteria for each proforma.

Options include:

Job code, Customer code, Profit Centre code, Job Manager, Job Type, Charge Type, Activity Group, Activity Code, Work Centre code, Schedule, or Status.

GT Delete JC Proformas

Job selection

All jobs

Job

Customer

Profit centre

Job manager

Job type

Charge type

Activity group

Activity code

Work centre

Schedule

Status

OK Cancel

A message will pop up letting you know how many Proformas are to be deleted and confirming the company it will be deleting them from.

GT Confirmation

You are about to delete 3 JC Proformas from company 06 - e-Computers - NZ. Are you sure you want to continue?

Yes No

Please check these details, then press **Yes** to delete the proformas.

All proformas meeting the criteria in that company will be deleted.

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. Either enter the New Registration Codes supplied and click **Install App** or click the **Check for Purchased Apps** button to display a list of apps recently purchased or renewed to install in bulk.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
000000	Apps For Greentree Form	App Usage information on Forms	<input checked="" type="checkbox"/>	31 December 2099	0-Edit Users		
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	<input checked="" type="checkbox"/>	23 June 2020	100-Edit Use		
010002	IN Reorder Workbench	Inventory Reorder Workbench	<input checked="" type="checkbox"/>	25 June 2021	100-Edit Use	Change	
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	<input checked="" type="checkbox"/>	30 June 2040	100-Edit Use	Change	
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales Hist	<input checked="" type="checkbox"/>	31 December 2099	100-Edit Use		
010005	AR/IN Pricing Tab	Pricing Tab in Customer and Inventory Maintenan	<input checked="" type="checkbox"/>	28 May 2021	0-Edit Users		
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	<input checked="" type="checkbox"/>	31 December 2099	100-Edit Use	Change	

4. Select/Highlight the **Delete JC Proformas** App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
000000	Apps For Greentree Form	App Usage information on Forms	<input checked="" type="checkbox"/>	31 December 2099	0-Edit Users		
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Orders	<input checked="" type="checkbox"/>	31 December 2099	100-Edit Users		
010002	IN Reorder Workbench	Inventory Reorder Workbench	<input checked="" type="checkbox"/>	31 December 2099	100-Edit Users	Change	

5. Click on the **Edit Users** button and select the users who will be configured to use Delete JC Proformas, for which companies.

User	e-Computers - Australia	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

6. Once you have selected the users, **Save** the settings, and **Close** the window.
7. **Save** and **Close** the Module Control form.

OTHER GREENTREE CONFIGURATION

Not required for this app.

APP CONFIGURATION

Not required for this app.