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 recreate 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 regenerate 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

earch Apps4GT Inventory Reorder Apps4GT Job Cost Bulk cost write-off Change Job Codes Deactivate JC Employees Delete JC Estimates Delete JC Proformas Export Job Cost Transactions Export Job Estimates Export Jobs Generate JC Proforma GL Journals Import JC Activity Codes Import JC Activity Codes Import JC Dob Close Import JC Job Close Import JC Job Types Import JC Price Books	This script will delete all JC Proformas for the current company. It w you a confirmation message on how many proformas are about to and will give you the option to not proceed with the deletion.	
—Import JC Work Centres		

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	Q	
Customer	<u></u>	
Profit centre	Q	
Job manager	<u></u>	
Job type	Q	
Charge type	Q	
Activity group	Q	
Activity code	Q	
Work centre	Q	
Schedule	Q	
Status	Q	
	01	Consul
	ОК	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 Proform	mas from compa	any 06 - e-Computers - NZ. Are you sure you want to continue?			
		<u>Y</u> es	<u>N</u> o			

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.

GT		Apps For Gre	entree	Module Control				×
	8 0 %	: # @						S AFG 🕞 🗊 🖉 🖉 🕐
Enter N	ew Registration Code	Install Ap	p	Check for Purchase	d Apps	Delete Inactive	/Expired Apps	Uninstall Apps For Greentree
	Filter Apps	View Add	15		_			
Code	Name	Description	Active	Expiry Date	User Coun	t Settings	App Count	-
000000	Apps For Greentree Form	App Usage information on Forms	₹	31 December 2099	0-Edit Use	ers		1
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	1	23 June 2020	100-Edit U	Jse		
010002	IN Reorder Workbench	Inventory Reorder Workbench	•	25 June 2021	100-Edit U	Jse Change	1	
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	•	30 June 2040	100-Edit U	Jse Change		
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales His	v	31 December 2099	100-Edit U	Jse		
010005	AR/IN Pricing Tab	Pricing Tab in Customer and Inventory Maintenan	1	28 May 2021	0-Edit Use	ers		
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	•	31 December 2099	100-Edit U	Jse Change		
		l <u>.</u>	-					1 1

4. Select/Highlight the Delete JC Proformas App.

GT			Apps For Greentree Mo	odule Control				_ □	x c
	E 0 %	: # @					\lnot AFG \bigcirc	• • •	₫ @
Enter N	ew Registration Code		Install App		Delete Inac	tive/Expired Apps	Uninstall	Apps For Gree	entree
	Filter Apps		View Audits						
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count	
000000	Apps For Greentree Form	App Usage information on Fo	verns	1	31 December 2099	0.Edit Urarr			
010001	AR Sales Orders Tab	Tab in Customer maintenanc	e to display Sales Orders	1	31 December 2099	100-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workbend	sh	1	31 December 2099	TOU-EUR 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.

GT	App	For Greentree Man	ager App User Acce	55	_ □
G	0 %	# @		P	AFG 🕞 📴 🤣 🖉 🕂 (
User Count Limit	100	• Users O Teams			
User	e-Computers - Australi	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07) ¢
All Users					
001 EDI AK					
001 EDI HN	Г	v		Γ	V

- 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.