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

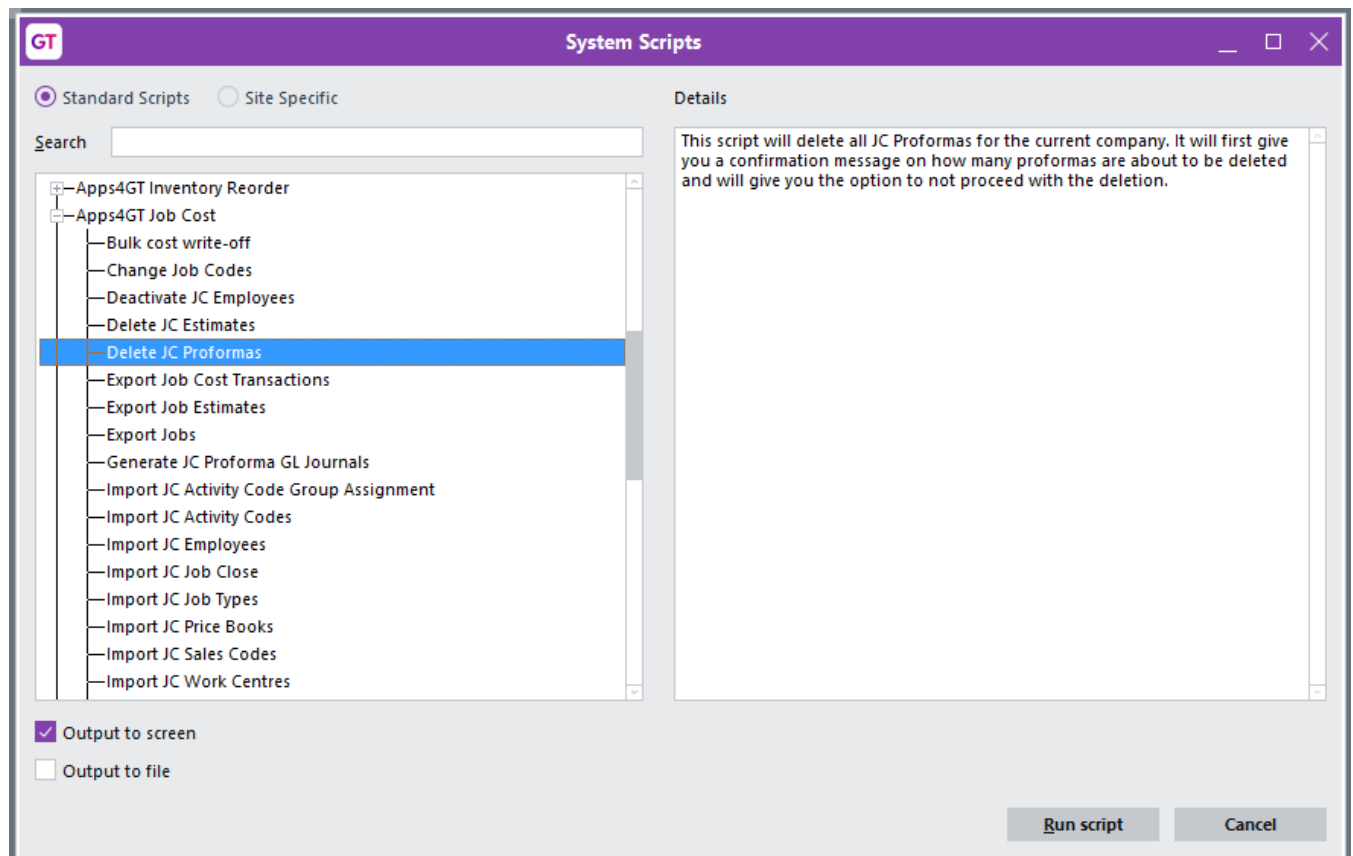## DELETE JC PROFORMAS

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.

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.

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.

4. Select/Highlight the Delete JC Proformas App.

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

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.