

VERSION 1.0  
SEPTEMBER 11, 2018

# Apps for Greentree

## INTERCOMPANY ATTACHMENTS AP/AR INVOICES

APP NUMBER: 010137

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. CRM Service Request Email including Attachments

This App is designed to be used where one Greentree company raises an AR invoice to another company within the same Greentree database. The App will create and attach a copy of the AR invoice to the AP invoice as well as any other attachments on the AR invoice.

The app will find the AP invoice in the target company by first looking at a User Defined Field on the customer to get the target company then searching for an AP Invoice with the same reference.

This App is particularly useful where both the AR an AP invoices have been created by a FREE import.

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### 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.

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### OTHER REQUIREMENTS

**Greentree Modules:** None

**Associated Apps:** None

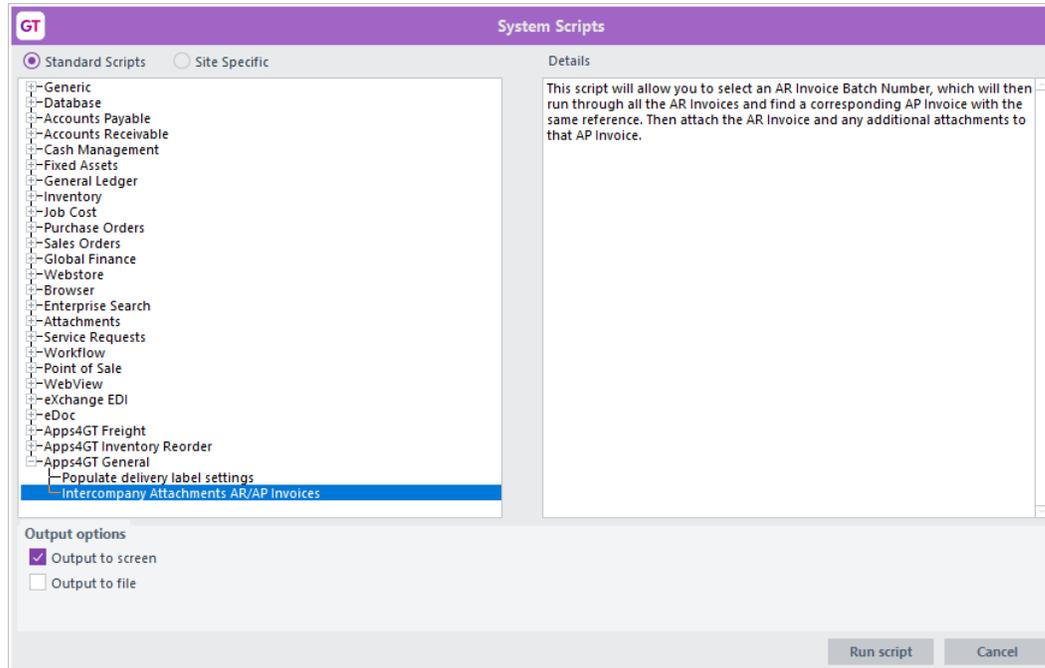
## USER INSTRUCTIONS

### CREATE ATTACHMENTS

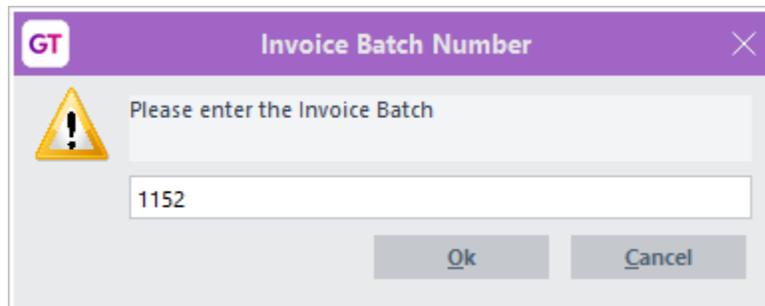
The App adds a new System Script “Intercompany Attachments AR/AP Invoices” under “Apps4GT General”.

You must be logged into the company that has the AR batch.

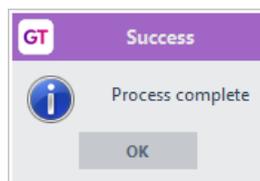
Select the menu item | System | Utilities | System Scripts |



Click on **Intercompany Attachments AR/AP Invoices**, then **Run script**



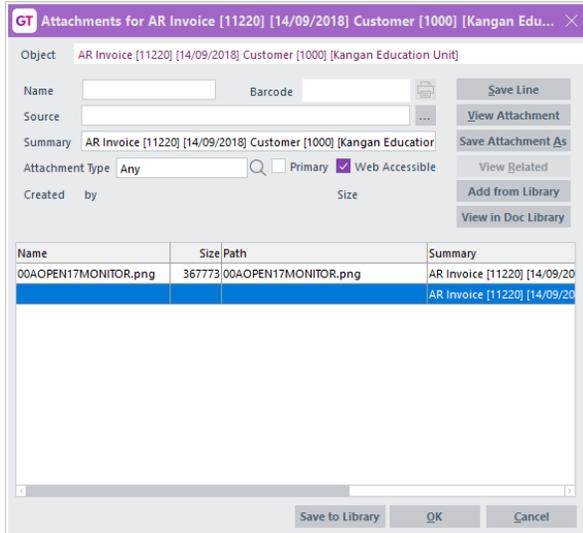
Enter the AR invoice batch number the click **Ok**



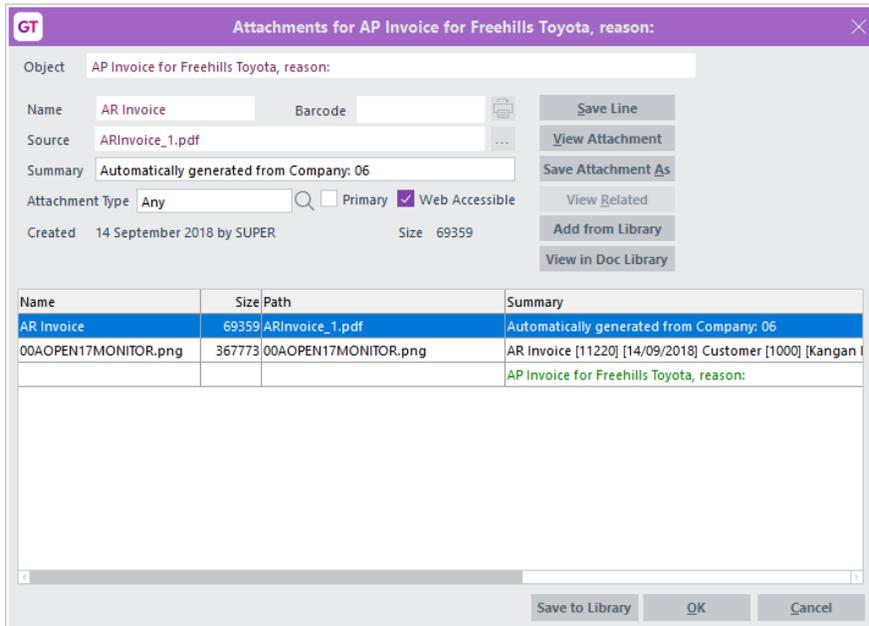
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## RESULT:

In this example the AR Invoice had 1 attachment:



The target AP invoice now has this attachment and an image of the invoice:



## IMPLEMENTATION GUIDE

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

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### 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

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
000000	Apps For Greentree Forms	App Usage information on Forms	<input type="checkbox"/>	31 December 2099	0-Edit Users		
010002	IN Reorder Workbench	Inventory Reorder Workbench	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010010	Email Copy Invoices	Functionality to email customer invoice copies	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010025	SD Freight	Functionality to add Freight rule to Sales Orders	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010034	IN Location Transfer Workbench	Workbench to perform location transfers	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	

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

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
000000	Apps For Greentree Forms	App Usage information on Forms	<input type="checkbox"/>	31 December 2099	0-Edit Users		
010002	IN Reorder Workbench	Inventory Reorder Workbench	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010010	Email Copy Invoices	Functionality to email customer invoice copies	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010025	SD Freight	Functionality to add Freight rule to Sales Orders	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010034	IN Location Transfer Workbench	Workbench to perform location transfers	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010040	Audit Logging and Reporting	Tracking of changes to specified properties on Greentree	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010043	A&A Helper	Additional A&A functionality including programmatic	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010047	Enquire/Print GL Journal	Functionality to view or print GL Journals from transactions	<input type="checkbox"/>	31 December 2049	100-Edit Use		
010048	Buy-In Code	Functionality to create Stock Code in Sales Order	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010062	User Timeout	Functionality to automatically logout a user after a specified	<input type="checkbox"/>	31 December 2049	100-Edit Use		
010075	Custom Script Property	Functionality to allow Custom scripts to become Properties	<input checked="" type="checkbox"/>	31 December 2049	100-Edit Use		
010077	Create Job from CRM Quote	Functionality to create a Job from a CRM Quote	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
010109	Inventory Dimensions	This App will enable Inventory Dimensions	<input type="checkbox"/>	13 August 2019	0-Edit Users	Change	
010137	Intercompany Attachments	This App will add a script which will allow you to send attachments	<input type="checkbox"/>	31 December 2049	100-Edit Use	Change	
019000	eDocs Scraping AP Invoices	eDocs Scraping for Supplier Invoices/Credits	<input type="checkbox"/>	31 December 2049	100-Edit Use		

- Click on the Edit Users button and select the users who will be configured to use the app and for which companies.

The screenshot shows a window titled "Apps For Greentree Manager App User Access". At the top, there is a "User Count Limit" field with the value "100". Below this is a table with columns for different regions and rows for various users. The table is as follows:

User	e-Computers - Australia	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers -
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Amanda Algar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
cameron	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chelsea Cork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Craig				<input checked="" type="checkbox"/>	<input type="checkbox"/>
CRM SERVICE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
EDIUser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.
8. Click the **Change** button

The screenshot shows a window titled "Intercompany Attachment Control Form". It features a search field with the label "AR Customer UDF for Target Company" and a search icon. The text "Company" is entered into the search field.

Specify the name of the UDF that will hold the target company

## GREENTREE CONFIGURATION

| System | Accounts Receivable | User Defined Fields

Name	Type	Length	Decimals
Review Date	Date		
UBD Ref	String	10	
Company	String	30	

Create a new user defined field, with type = "String".

| Data Entry | Accounts Receivable | Customer Maintenance

Tree	Value
Customer Type-NZ	School Tertiary
Region-NZ	Southland

Field	Value
Company	01
Map Ref.	56 D23
Review Date	21/12/2011

Set the target company for each intercompany customer.