VERSION 1.0 SEPTEMBER 11, 2018

# Apps for Greentree

# INTERCOMPANY ATTACHMENTS AP/AR INVOICES

APP NUMBER: 010137

Powered by:

MYOB Greentree

### **TABLE OF CONTENTS**

Features	2
Important Notes	2
Other Requirements	2
User Instructions	3
Sending a communication	Error! Bookmark not defined.
Sending a communication	Error! Bookmark not defined. 4
Sending a communication Implementation Guide App Installation	Error! Bookmark not defined. 4

# **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.

#### **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: 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

GT	Invoice Batch Number										
	Please enter the Invoice Batch										
	1152										
		<u>O</u> k	<u>C</u> ancel								

Enter the AR invoice batch number the click Ok



#### **RESULT:**

In this example the AR Invoice had 1 attachment:

GT Attachments for AR	Invoice [11220] [14/09/2018] Cu	stomer [1000] [Kangan Edu $ imes$
Object AR Invoice [11220]	[14/09/2018] Customer [1000] [Kangan	Education Unit]
Name	Barcode	Save Line
Source		<u>V</u> iew Attachment
Summary AR Invoice [1122	0] [14/09/2018] Customer [1000] [Kanga	an Education Save Attachment As
Attachment Type Any	🔍 🗌 Primary 🔽 We	b Accessible View <u>R</u> elated
Created by	Size	Add from Library
		View in Doc Library
Name	Size Path	Summary
00AOPEN17MONITOR.png	367773 00AOPEN17MONITOR.png	AR Invoice [11220] [14/09/20
		AR Invoice [11220] [14/09/20
<		
	Save to Librar	ry <u>O</u> K <u>C</u> ancel

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

GT			At	achments for	AP In	voice	for Free	ehill:	s Toyota, reasor	1:			×
Object	AP Invo	ice for Fre	ehills Toy	ota, reason:									
Name	AR In	voice		Barcode					Save Line				
Source	ARInv	oice_1.pdf							View Attachme	ent			
Summary	Autor	natically g	enerated	from Company: (	6				Save Attachmen	t <u>A</u> s			
Attachmer	nt Type	Any		Q 🗌 Pri	nary	✓ We	b Accessi	ble	View <u>R</u> elated	1			
Created	14 Sep	tember 20	18 by SU	PER	9	Size	69359		Add from Libra	агу			
									View in Doc Lib	rary			
Name			Siz	e Path				Sun	nmany				
AR Invoice			6935	9 ARInvoice_1.pd				Aut	omatically generat	ed from	Compan	y: 06	
00AOPEN17	MONIT	OR.png	36777	3 00AOPEN17MO	NITOR.	png		AR Invoice [11220] [14/09/2018] Customer [1000] [Kangan I					[Kangan l
								AP	nvoice for Freehill	s Toyota	, reason:		
<													2
									Save to Library	<u>(</u>	<u>)</u> K	<u>C</u> a	ncel

#### **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

GT	T Apps For Greentree Module Control _ 🗌												
		: # @							$\odot \blacksquare \not ? ? \land ? ?$				
Enter N	ew Registration Coc	g3fs62s8id8a	Install App		Load from File	ļ	<u>D</u> elete Inactive	/Expired App	Uninstall Apps For Greentre				
	Filter Apps												
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count					
000000	Apps For Greentree Forr	r App Usage information on Form	s		31 December 2099	0-Edit Users	5						
010002	IN Reorder Workbench	Inventory Reorder Workbench			31 December 2049	100-Edit Use	e Change						
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields			31 December 2049	100-Edit Use	e Change						
010010	Email Copy Invoices	Functionality to email customer invoice copies			31 December 2049	100-Edit Use	e Change						
010025	SO Freight	Functionality to add Freight rule	to Sales Orders		31 December 2049	100-Edit Use	e Change						
010034	IN Location Transfer W/	Workbench to perform location	transfers		31 December 2049	100-Edit Use	Change						

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

GT			Apps For Gre	entree	Module Control				_ 🗆 ×
		: 49 @							⊕ ◘ # & ∆ 0
Enter N	ew Registration Coc 🤇	j3fs62s8id8a	Install App		Load from File	<u>[</u>	<u>)</u> elete Inactive	/Expired App	Uninstall Apps For Greentree
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count	
000000	Apps For Greentree Form	App Usage information on Form:	s		31 December 2099	0-Edit Users			
010002	IN Reorder Workbench	Inventory Reorder Workbench			31 December 2049	100-Edit Use	Change		
010006	Transaction UDF	Tab in Transaction Entry for Cu:	stom UDF Fields		31 December 2049	100-Edit Use	Change		
010010	Email Copy Invoices	Functionality to email customer i	nvoice copies		31 December 2049	100-Edit Use	Change		
010025	SO Freight	Functionality to add Freight rule	to Sales Orders		31 December 2049	100-Edit Use	Change		
010034	IN Location Transfer Wo	Workbench to perform location	transfers		31 December 2049	100-Edit Use	Change		
010040	Audit Logging and Repo	Tracking of changes to specifie	d properties on Gre		31 December 2049	100-Edit Use	Change		
010043	A&A Helper	Additional A&A functionality inclu	uding programmatio		31 December 2049	100-Edit Use	Change		
010047	Enquire/Print GL Journal	Functionality to view or print GL	Journals from tran:		31 December 2049	100-Edit Use	5		
010048	Buy-In Code	Functionality to create Stock Co	ide in Sales Order		31 December 2049	100-Edit Use	Change		
010062	User Timeout	Functionality to automatically log	gout a user after a		31 December 2049	100-Edit Use	5		
010075	Custom Script Property	Functionality to allow Custom sc	ripts to become Pl		31 December 2049	100-Edit Use	5		
010077	Create Job from CRM Qu	, Functionality to create a Job from	m a CRM Quote		31 December 2049	100-Edit Use	Change		
010109	Inventory Dimensions	This App will enable Inventory D	imensions		13 August 2019	0-Edit Users	Change		
010137	Intercompany Attachmer	This App will add a script which	will allow you to se		31 December 2049	100-Edit Use	Change		
019000	eDocs Scraping AP Invo	eDocs Scraping for Supplier Inv	oices/Credits		31 December 2049	100-Edit Use	5		

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

GT	Apps For	Greentree Manage	r App User Access		_ 🗆 X
		H @		€[	∎⊅∂∆⊙
User Count Limit	100				
User	e-Computers - Australia	e-Computers - Canada	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers -
All Users					
ADMIN					
Amanda Algar				<b>V</b>	
Angela Allen				<b>V</b>	
April Aston					
cameron				<b>V</b>	
Chelsea Cork					
Craig				▼	
CRM SERVICE					
EDIUser				<b>V</b>	

- 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

GT		Intercompany A	Attachment Control Form	_ 🗆 ×
[		0 🕅	673 🕑	$\triangleright \odot \blacksquare \not ? ? \land ?$
AR Custor	ner UDF for	r Target Companj	Company	Q

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

#### **GREENTREE CONFIGURATION**

#### | System | Accounts Receivable | User Defined Fields

GT User defined customer fields										
		Delete	Add							
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

GT	T Customer Maintenance														
	7 🗆	Î C	2 18 (	#1 @ K	$- \leftarrow \rightarrow \rightarrow$	×									D
Code	Code 1000 Q Alpha KANGAN Q Name Kangan Education Unit Displayed currency Foreign O Local														
Ma	in (	)efaults	Integration	Credit	Delivery	Transactions	Web Us	ers	Custom	eXchange	Notes	WebView	eDocs	Freight	Related
Custo	mertrees							C	ustomer fields						
Tree				Val	ue			Field Value							
Custo	Customer Type-NZ School Tertiary						Company 01								
Regio	Region-NZ Southland						Map Ref. 56 D23								
						Review Date 21/12/2011									

Set the target company for each intercompany customer.