VERSION 1.0 JULY 9, 2018

# Apps for Greentree

# SUPPLIER PERFORMANCE SURVEYS

APP NUMBER: 010139

Powered by:

**MYOB** Greentree

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### **FEATURES**

#### **Supplier Performance Surveys**

This app provides the ability to create a Survey that is distributed to your Staff with a list of questions about specific suppliers. The Staff must login to Webview to answer these questions, the results of which can then be viewed in a table and graph within Supplier Maintenance and Supplier Enquiry.

#### **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: Financials, Webview, Alerts and Approvals

Associated Apps: None

# **USER INSTRUCTIONS**

#### SURVEY TYPE MAINTENANCE

There are two Types of survey that can be setup via the AppsForGreentree Module Control.

Only one of each type should be created.

The Internal type is for questions that you wish internal staff members to answer in regards to the supplier's performance.

The External type can be used if you wish to ask the Supplier themselves to rate how they feel about your performance. (Note the supplier would need to have a Webview login in order to answer these questions).

The Ratings defined in the top table will be the answers available for selection for any questions of type 'Header Selection'.

ode	Internal 🔍	Descripti	on Ryman Feedback		10		
Interna	al O External	Rating	Selection Text				
		1	Very dissatisfied				
		2	Somewhat dissatisfied				
		3	Neither satisfied nor dissatisfied				
		4	Somewhat satisfied				
		5	Very satisfied				
		÷.					
Number	Question			Туре	Active?	Settings	
Number	Question Please select your Villa	19		Type Selection	Active?	Settings	
Number 1 2	Question Please select your Villag	je rel of satis	sfaction with this supplier in the l	Type Selection Heading Only	Active?	Settings Settings	
Number 1 2 3	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne	je rel of satis	sfaction with this supplier in the l	Type Selection Heading Only Header Selection	Active?	Settings Settings	
Number 1 2 3 4	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne Responsiveness	je rel of satis eds	sfaction with this supplier in the l	Type Selection Heading Only Header Selection Header Selection	Active?	Settings Settings	
Number 1 2 3 4 5	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne Responsiveness Quality of Service	ge rel of satis eds	sfaction with this supplier in the I	Type Selection Heading Only Header Selection Header Selection Header Selection	Active?	Settings Settings	
Number 1 2 3 3 4 5 6	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne Responsiveness Quality of Service Order/Booking Process	ge rel of satis eds ing	sfaction with this supplier in the f	Type Selection Heading Only Header Selection Header Selection Header Selection	Active?	Settings Settings	
Number 1 2 3 3 4 5 6 7	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne Responsiveness Quality of Service Order/Booking Process Resolving issues	ge vel of satis eds ing	sfaction with this supplier in the l	Type Selection Heading Only Header Selection Header Selection Header Selection Header Selection	Active?	Settings Settings	
Number 1 2 3 4 5 6 7 8	Question Please select your Villag <b>Please rate your lev</b> Understanding Your Ne Responsiveness Quality of Service Order/Booking Process Resolving issues Communication	ge rel of satis eds	sfaction with this supplier in the l	Type Selection Heading Only Header Selection Header Selection Header Selection Header Selection Header Selection	Active?	Settings Settings	
Number 1 2 3 3 4 5 5 6 6 7 8 8 10	Question Please select your Villag Please rate your lev Understanding Your Ne Responsiveness Quality of Service Order/Booking Process Resolving issues Communication Comments	ge rel of satis reds ing	sfaction with this supplier in the l	Type Selection Heading Only Header Selection Header Selection Header Selection Header Selection Header Selection Free Text	Active?	Settings Settings	
Number 1 2 3 4 5 6 6 7 8 8 10 11	Question Please select your Villag Please rate your lev Understanding Your Ne Responsiveness Quality of Service Order/Booking Process Resolving issues Communication Comments	ge rel of satis ieds ing	sfaction with this supplier in the f	Type Selection Heading Only Header Selection Header Selection Header Selection Header Selection Header Selection Free Text Header Selection	Active?	Settings Settings	

There are four different Question Types available, as shown in the drop down list above.

It is possible to define a line as being a 'Heading Only', and to create questions that require a Free Text answer rather than selection from a pre-defined list of answers.

Free Text questions are not mandatory, all selection questions must be answered by the submitting user.

If a Question is setup of Type 'Selection', then click the 'Settings' button on the line to define the list of possible answers for this question.

Code	Internal 🔍	Descriptio	n Ryman Feedback						
<ul> <li>Interna</li> </ul>	l O External	Rating	Selection Text						
		1	Very dissatisfied						
		2	Somewhat dissatisfied						
		3	Neither satisfied nor dissatisfied						
		4	Somewhat satisfied				G Sur	vey Selections	
		5	Very satisfied				Dation	Indexes Tax	1
		6					Hating	Selection Text	
								Anthony Wilding	
				- W			2	Bert Sutcliffe	
Number	Question			Туре	Active?	Settings	3	Bob Owens	
1	Please select your Villag	e		Selection	•	Settings	4	Bob Scott	
2	Please rate your level of	satisfaction	with this supplier in the following areas:	Heading Only	•		5	Bruce McLaren	
3	Understanding Your Nee	eds		Header Selection	1		6	Charles Fleming	
4	Responsiveness			Header Selection	~		7	Charles Upham	
5	Quality of Service			Header Selection	1		8	Diana Isaac	
6	Order/Booking Processi	ng		Header Selection	~		9	Edmund Hillary	
7	Resolving issues			Header Selection	1		10	Ernest Rutherford	
8	Communication			Header Selection	~		11	Essie Summers	
10	Comments			Free Text	~		12	Evelyn Page	
				Vante venue e pare y are	-		12	Eronoco Hodakino	

Note: If you wish to change the questions after prior surveys have been created, you must deactivate the old questions by unticking the 'Active' box on the line, and then create new questions. Do not change existing questions, or this will distort prior results.

The order that the questions will be displayed in Webview is determined by the Question Number, and these can be renumbered if a change in order is desired, or when new questions are added.

#### SUPPLIER MAINTENANCE

For those Suppliers that you require surveys to be completed on, tick the 'Survey Required' box in Supplier Maintenance.

Note that the new 'Description/Information' field will be visible for all suppliers when this App is turned on, regardless of whether the supplier has this box ticked.

If any External Survey type has been setup, then an additional 'External Survey Email' field becomes visible in Supplier Maintenance. If external surveys are not in use, this field will not be visible.

G Supplier N	Maintenance		8			
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Main	Defaults Integration Ca	sh/Banking Transactions	Custom N	otes WebView eDocs Relat	ed Analysis	
Address Suburb Post code Country Phone Mobile Fax	City	Balances Include child balances Current balance Overdue 1 Overdue 2 Overdue 2 Overdue 3 Overdue 4+ Sub-total Future balance Hold balance Retention balance Total	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	Description / Information		Release/alter holds Apply transactions Create invoice Create standing invoice Create gredit note Create gredit note Create gayment Create payment Create payment
Lontacr Email Web Balance type Status	Open Item Active	History MTD purchases YTD purchases L/year purchases Last payment	0.00 0.00 0.00 0.00			

#### **CREATING THE SURVEY**

You might like to create a User Team to define who the survey's should be created for.

	laintenance					
	3 🕈 🖉 3	i 🔊 d		8 🗉 🖉	P	🛯 🗔 🥩 S 🛆 💡
Name Sup	plier Survey Recipie	nts		×.		
✓ Ignore for Username	security settings Real Name	Teams	Select			
SUPER	Super User	5				
Team <u>P</u> refe	rences					Add <u>U</u> ser

Then a Workflow A&A Rule is required to create the Surveys for the required Suppliers and Users. You will need to work with your Greentree partner to have the custom script written for this rule.

This allows you to customize who the surveys are sent to, when they are created, and how long users have to complete them before they expire.

	· · · · ·	inci ourvey creation		T necola type			40 <sup>°</sup>
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'nonty	U					Inactive	E <u>x</u> port.
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In	VAppsCompany	Contraction of the second s	iption			×,	
/hen	Form Driven Include Brows	er Client forms	Not applicable to Mo	obile			
	🔄 On New 🔛 On Chang	e 🔛 On Delete					
	I Ignore suppression flag	û.					
	Scheduled			<u>H</u> un Now			
	✓ Use predefined Compar	у.					
	Programmatic						
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	On Autoscan Attachme	ent					
	-On Final Approval					Ē	
	On Escalation						
	On Inbound Email						
	Con Un-Assigning of Ap	proval code				E.	

#### WEBVIEW PAGE SETUP

Webview pages need to be created as per below and linked to a Menu.

enu Name Ville denu Item	age Manager 🔍 Defau	It Start Page My Pending App	rovals 🥄	
Name	🔟 My Pending Surveys 🔍	My Pending Approvals My Pending Surveys Supplier Enquiry		
Page	onlineWebForm 🛛 💙 My Pending Surveys 🔍		*	
O URL			₩ '	

G WebView	Page Maintenance					
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Name	My Pending Surveys	٩				
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Form	My Pending Surveys	V	Init Method	Add Delete		

G WebViev	w Form Designer	🌱 Name 🛛 My F	'ending Surveys	۹ 🖉	Base Class User	
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Design		wvSurveyPageł	leading	G Section Properties		
Page Size		myVApp	Survey.e	Main Style Que Section position Normal Name Surveys Awaiting Completin Content allVApps	py/Sort Other WebView	
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G WebViev	w Form Designer	🌱 Name 🛛 My F	Pending Surveys	٩ 🛛	🖗 📇 Base Class User	V 8
<b>W</b> Design		wySurveyPage	2 • 1 • 3 • 1 • 4 • 1 • 5	5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 • 9	.   . 10 .   . 11 .   . 12 .   . 13 .   . 14 .	+ 15 + 1 + 16 + 1 + 17 + 1 + 18 + 1 + 18
Page Size			G Field Proper Main Style ✓ Enable Drilldow Page Type	ties Format Other II m other V	WebView	
	ys Awaiting Comp 암		Page Column Width (px) Footer Summary Filter Options	Supplier Survey 400 None None		
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Code	Supplier Survey	٩				
Name	Supplier Survey	2				
Page Type	onlineSupplierSurvey				Navigator	

#### **COMPLETING THE SURVEY QUESTIONS**

Users that are required to complete these surveys must have a Webview login in order to access them.

Webview pages are customized to suit individual sites, so your pages will not necessarily be formatted as per the following screenshots.

E State Attp://localhost/webviewtest/pageVRD.vrd	の - 👌 🍯 My Pending Surveys	× 🗎 🕺 🕆 🔅
Show Menu >		[Sersion Control]   [Session Values]   **TEST** Duman Healthcare Ltd [change]   I OCOLIT
My Pending Surveys		
Please complete the following surveys before the	Due Date	
Thease complete the following surveys before the	Due Dute	
		1
Surveys Awaiting Completion		
Supplier	Due Date	
CARTERS	22/06/18	
FISHER and PAYKEL APPLIANCES LTD	22/06/18	
FIRTH INDUSTRIES LIMITED	22/06/18	



Once all the questions have been answered, the user clicks 'Save and Complete' to submit the survey. Alternatively they can partially complete it by using the 'Save' button, and then come back later to complete it

#### VIEWING THE SURVEY RESULTS

When the 'Survey Required' box is ticked in Supplier Maintenance, this makes Current Satisfaction Rating visible on the Main tab. It also enables the Survey Results and Survey Graph tabs.

G Supplier M	laintenance				
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Code 7794	🍳 Alpha 🛛 🔍 Name			<b>.</b>	
		Displayed currency O Foreig	n 🔹 Local		
Main D	efaults Integration Cash/Banking	Transactions Custom N	lotes WebView	Survey Results Survey Graph eDocs Relate	ed Analysis
Address		Balances		Description / Information	
		Include child balances		This is the new information box where details about the suppl	ier can be entered.
		Current balance	12.066.17		
Cuburb		Overdue 1	0.00		
Suburb	nmure	Overdue 2	0.00		
Post code	🔍 City Auckland 🌂	Overdue 3	0.00		
Country	New Zealand 🛛 🔻	Uverdue 4+			
Phone		Sub-total	12,066.17		
La a tra		Future balance	0.00		
Mobile			1.52		
Fax		Hetention balance		Survey Required?	
Contact	1	Total	12,067.49	Current satisfaction rating:	
Email		History		C Very satisfied	
Web		MTD purchases	13,966.95	<ul> <li>Somewhat satisfied</li> </ul>	
1100		YTD purchases	57,066.81	Neither satisfied nor dissatisfied	
Balance type	Open Item 🔍 🔍	L/year purchases	384,716.71	Somewhat dissatisfied	
Status	Active	Last payment	31,095.49	Very dissatisfied	
		Last payment date	21/05/2018		

All the results can be seen within the graph on the Survey Results tab.

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de 🔍 Alp	bha	Rame			2								
		Displa	yed currency O Foreign	Local									
Main Def	aults Ir	itegration Cash/B	anking Transactio	ons Cust	om Note:	WebView	Survey Resul	ts Surv	vey Graph	eDocs	Related	1	Analysis
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19 June 2018, 09:18:52	4.50	Margaret Stoddard	3	5	5	4	5	5					
15 June 2018, 16:01:46	4.50	Ferrie Summers	Å	5	Å	5	Ă	5	Veru hanou with	018	tomer service		
15. June 2018, 16:04:25	4.50	Malvina Maior	5	5	Å	5	Å	Ă	T CIY Huppy Will	500	contar activide		
5.June 2018 16:03:27	2.33	Margaret Stoddard	3	2	2	3	3	1	Terrible at replyin	nd to emails			
ant Auguage	4 17		3 50	4.50	4.50	3.50	4.50	4 60					
			3.30	4 6 11 1	77.5111								
Last Average Previous Average	3.78		4.00	4.00	3.33	4.33	3.67	3.33					
asi Average Previous Average	3.78		3.00 4.00	4.00 4.00	3.33	4.33	3.67	3.33					
<	3.78		3.30 4.00	•.30 4.00	3.33	4.33	3.67	3.33					
Las: Average Previous Average	3.78 Overall Rating	Please select the Vilage to	3.00 4.00	4.00	3.33	4.33	3.67	3.33					
Average     Previous Average     Ime Completed     Time Completed     Tisure 2018, 16:05:55	3.78 Overall Rating 4.00	Please select the Village to Village to A	3.90 4.00	Communication     4	a Professionalism	4.33 Promptness of Payment 3	3.67	t business and are	committed to streng	gthening the r	elationship		

On the Survey Graph tab the results from the last two batches of surveys are graphically presented.



The default view is a Bar Graph, but it is possible to change the view to various other types of graph...



For example a Pie Graph if desired...



## **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. Enter the New Registration Code supplied and click Install App

G Apps For Greentree Module Cor	itrol							
💾 🧳 🎥	60 d	8 🗉 🖉	-9	🛯 🗔 🥜 🕱 🛕 💡				
Enter New Registration Code 1a2b3c4d5f	Install App		Delete Inacti	Delete Inactive/Expired Apps		Uninstall Apps For Greentree		
Filter Apps								
Code 🚈 Name	Description	Active	Expiry Date	User Count	Settings	App Count		
19002 eDocs Scraping AP Statements eDocs Scraping for Supplier Statements		V	01 February 2019	100-Edit User		10		
019000 eDocs Scraping AP Invoices/Credits	eDocs Scraping for Supplier Invoices/Credits		01 February 2019	100-Edit User				

4. Select/Highlight the Supplier Performance App.

	8 2	<b>*a</b>	1 d	8 💷 [	19		4	Ξ.	884
Inter N	ew Registration Code Filter Anns			Install App		Delete Inacti	ve/Expired App	s <u>U</u> ninsta	II Apps For Gree
o do 183	Nama	- I.;	Description		Active	Expiry Date	User Count	Settings	App Count
Jue	ritanio								
9002	eDocs Scraping AP :	Statements	eDocs Scraping for	Supplier Statements	~	01 February 2019	100-Edit User		Colored 1
9002 9000	eDocs Scraping AP : eDocs Scraping AP :	Statements nvoices/Credits	eDocs Scraping for eDocs Scraping for	Supplier Statements Supplier Invoices/Credits	2	01 February 2019 01 February 2019	100-Edit User 100-Edit User		
9002 9000 9000	eDocs Scraping AP eDocs Scraping AP Supplier Performance	itatements nvoices/Credits	eDocs Scraping for eDocs Scraping for This App will add an	Supplier Statements Supplier Invoices/Credits -Supplier Performance survey and results.	V V V	01 February 2019 01 February 2019 31 December 2049	100-Edit User 100-Edit User 100-Edit User	Change	
002 19002 19000 0139 0076	eDocs Scraping AP eDocs Scraping AP Supplier Performance AP Payment Selectic	Statements nvoices/Credits n Rules	eDocs Scraping for eDocs Scraping for This App will add an Functionality to allow	Supplier Statements Supplier Invoices/Credits Supplier Performance survey and results v A&A rules to selection AP Invoice and Cred		01 February 2019 01 February 2019 31 December 2049 23 May 2019	100-Edit User 100-Edit User 100-Edit User 100-Edit User	Change	

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

T		Apps	Apps For Greentree Manager App User Access					×
8	0 %	H @					▷☺▣ፇዖ◿	<u>%</u>
User Count Limit	100							
User	***** e-Computers - Au	***** e-Computers - Ca *	**** e-Computers - US	***** e-Computers - NZ	***** e-Computers - Ul	***** e-Computers - Ire	***** e-Consolidations	
All Users								
ADMIN								
Amanda								
Angela Allen				~				
April Aston								
cameron				2				
Chelsea Cork								
Craig				2				
CRM SERVICE								
EDIUser				N				
HR Monthly								
HR Weekly								
					12			

- 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.