VERSION 1.0

APRIL 29, 2019

Apps for Greentree

JOB MAINTENANCE FORM HIERARCHY HIDE CLOSED JOBS

APP NUMBER: 010142

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features 2

Important Notes 2

Other Requirements 2

User Instructions 3

Job Maintenance 3

Implementation Guide 5

APP INSTALLATION 5

APP CONFIGURATION 5

FEATURES

1. **Job Cost Maintenance - Hide Closed Jobs.**

   This App add a "Display Closed Jobs" check box to the main Job Maintenance form.

   By default, this is set according to app control setting.

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.

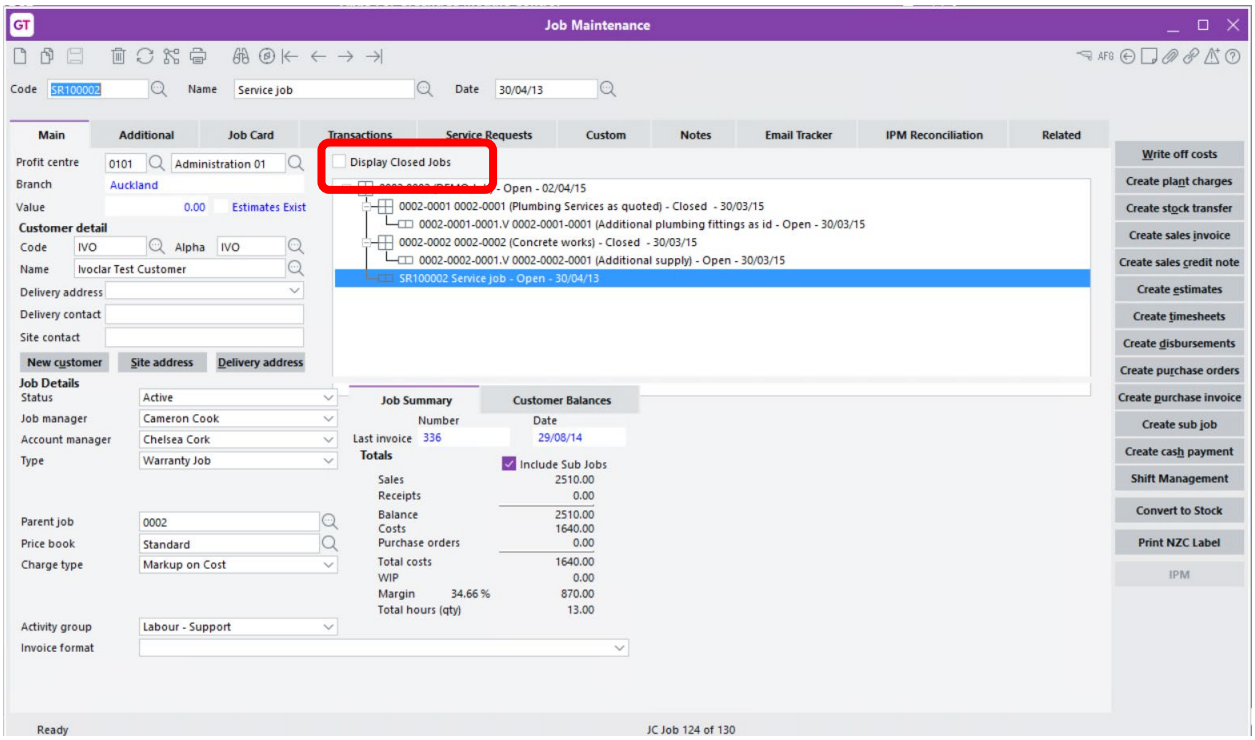
Associated Apps: None.

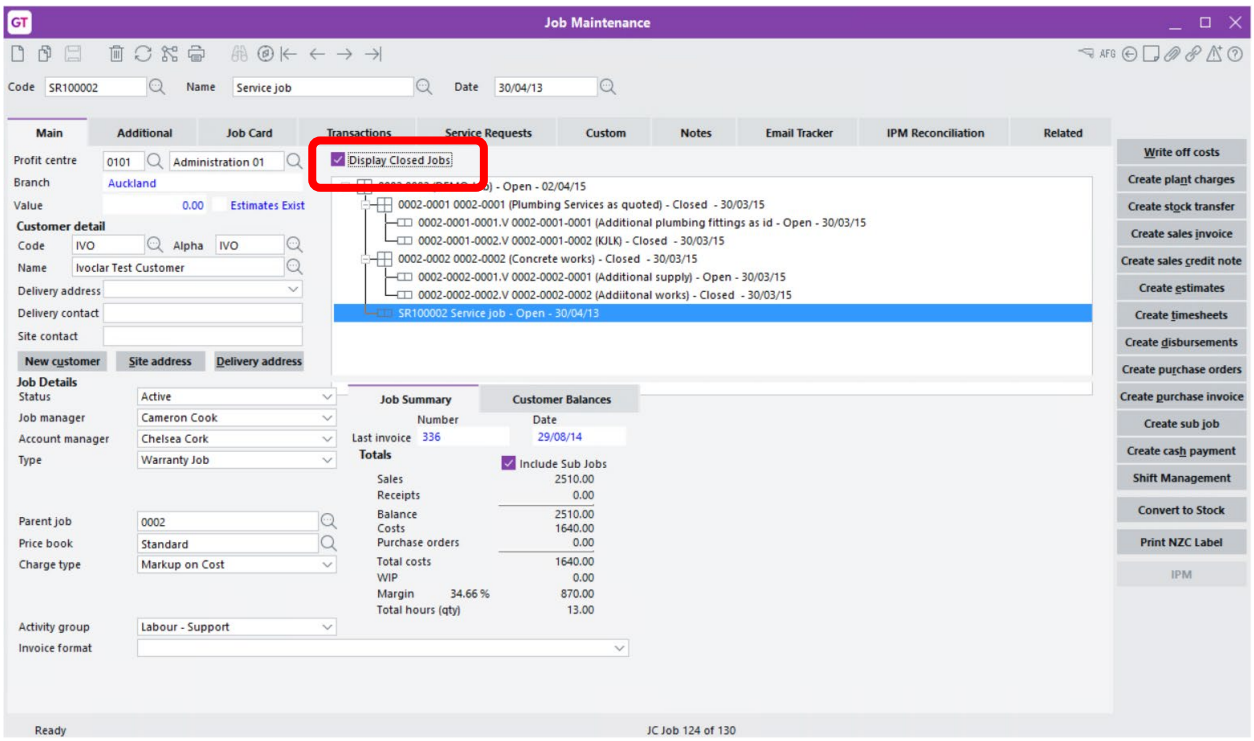
JOB MAINTENANCE

This App provides the ability to suppress closed jobs when displaying the job hierarchy.

The initial setting of the checkbox will follow how the app has been configured.

- If Display Closed Jobs is not ticked then only jobs in the Job Hierarchy Tree on the main tab that are open, or closed parent jobs if the parent has a child that is open, will be displayed
- If Display Closed Jobs is ticked all jobs in Job Hierarchy Tree will be displayed.



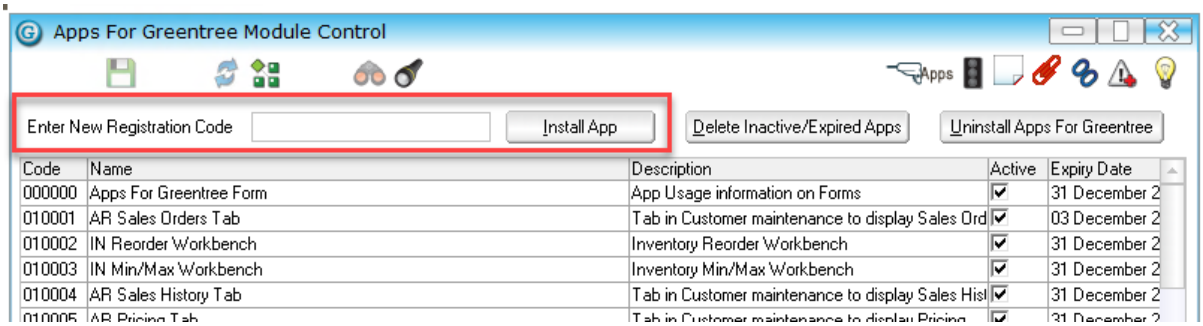

Job Maintenance
Code SR100002
Name Service job
Date 30/04/13
Main
Additional
Job Card
Transactions
Service Requests
Custom
Notes
Email Tracker
IPM Reconciliation
Related
Profit centre 0101 Administration 01
Branch Auckland
Value 0.00 Estimates Exist
Customer detail
Code IVO Alpha IVO
Name Ivoclar Test Customer
Delivery address
Delivery contact
Site contact
New customer
Site address
Delivery address
Job Details
Status Active
Job manager Cameron Cook
Account manager Chelsea Cork
Type Warranty Job
Parent job 0002
Price book Standard
Charge type Markup on Cost
Activity group Labour - Support
Invoice format
Display Closed Jobs
- Open - 02/04/15
0002-0001 0002-0001 (Plumbing Services as quoted) - Closed - 30/03/15
0002-0001-0001.V 0002-0001-0001 (Additional plumbing fittings as id - Open - 30/03/15
0002-0001-0002.V 0002-0001-0002 (KJLK) - Closed - 30/03/15
0002-0002 0002-0002 (Concrete works) - Closed - 30/03/15
0002-0002-0001.V 0002-0002-0001 (Additional supply) - Open - 30/03/15
0002-0002-0002.V 0002-0002-0002 (Addiitonal works) - Closed - 30/03/15
SR100002 Service job - Open - 30/04/13
Job Summary
Customer Balances
Number
Date
Last invoice 336
29/08/14
Totals
Include Sub Jobs
Sales 2510.00
Receipts 0.00
Balance 2510.00
Costs 1640.00
Purchase orders 0.00
Total costs 1640.00
WIP 0.00
Margin 34.66 % 870.00
Total hours (qty) 13.00
Write off costs
Create plant charges
Create stock transfer
Create sales invoice
Create sales credit note
Create estimates
Create timesheets
Create disbursements
Create purchase orders
Create purchase invoice
Create sub job
Create cash payment
Shift Management
Convert to Stock
Print NZC Label
IPM
Ready
JC Job 124 of 130

IMPLEMENTATION GUIDE

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

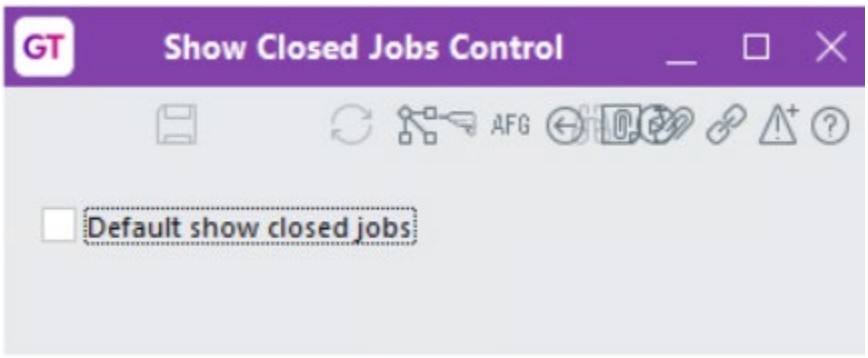
APP INSTALLATION

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 Codes supplied and click Install App



4. Select/Highlight the Job Maintenance Form Hierarchy hide Closed Jobs App.
5. Click on the Edit Users button and select the users who will be configured to use the App, for which companies.
6. Save and Close the form.

APP CONFIGURATION

1. Select/Highlight the Job Maintenance Form Hierarchy hide Closed Jobs App.
2. Click on the Change button

The only configuration is setting of Default show closed jobs.