VERSION 1.0 APRIL 29, 2019

Apps for Greentree

JOB MAINTENANCE FORM HIERARCHY HIDE CLOSED JOBS

APP NUMBER: 010142

Powered by:

MYOB Greentree

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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.

USER INSTRUCTIONS

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.

| GT | | | | | Job Maintenan | ice | | | | × |
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| Code 58100002 | Q Nam | ne Service job | | 📿 Date | 30/04/13 | | | | | |
| | _ | | | | | | | | | |
| Main A | dditional | Job Card | Tra | ansactions Service Re | quests Custom | Notes | Email Tracker | IPM Reconciliation | Related | |
| Profit centre 010 | 1 Q Admin | istration 01 Q | E | Display Closed Jobs | | | | | | Write off costs |
| Branch Aud | ckland | | Ļ | | Open - 02/04/15 | | | | | Create plant charges |
| Value | 0.00 | Estimates Exist | | 0002-0001 0002-00 |)1 (Plumbing Services as qu | oted) - Closed - 30/ | 03/15 | | | Create stock transfer |
| Customer detail | 0 | | | 0002-0001-0001 | .V 0002-0001-0001 (Additio 2 (Concrete works) - Close | nal plumbing fitting d = 30/03/15 | is as id - Open - 30/03/ | 15 | | Create sales invoice |
| Code IVO | C Alpha | NO Q | | L 0002-0002-0001 | .V 0002-0002-0001 (Additio | nal supply) - Open - | 30/03/15 | | | Create sales credit note |
| Delivery address | st customer | ~ | | SR100002 Service jo | b - Open - 30/04/13 | | | | | Create estimates |
| Delivery contact | | | | | | | | | | Create timesheets |
| Site contact | | | | | | | | | | Create dichursements |
| New customer | Site address | Delivery address | | | | | | | | |
| Job Details | | | | | | | | | | Create purchase orders |
| Status | Active | | ~ | Job Summary | Customer Balances | | | | | Create <u>purchase</u> invoice |
| Job manager | Cameron Cod | ок | ~ | Number | 29/08/14 | | | | | Create sub job |
| Type | Warranty Joh | 2 | V | Totals | | | | | | Create cash payment |
| | | | | Sales | 2510.00 | | | | | Shift Management |
| | | | | Receipts | 0.00 | | | | | Convert to Stock |
| Parent job | 0002 | | Q | Costs | 2510.00 | | | | | CONVERTIO SLOCK |
| Price book | Standard | | Q | Purchase orders | 0.00 | | | | | Print NZC Label |
| Charge type | Markup on C | Cost | \sim | Total costs WIP | 1640.00 | | | | | IPM |
| | | | | Margin 34.66 % | 870.00 | | | | | |
| Activity group | Labour - Sup | port | ~ | Total hours (qty) | 13.00 | | | | | |
| Invoice format | | | | | ~ | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | 101-1-101-0-100 | | | | |
| Ready | | | | | | JC Job 124 of 130 | | | | |

| ਗ਼ | | | | | Job Mainte | nance | | | | | × |
|------------------|-----------------------|-------------------------------|--------------------------|--------------------------|-------------------------|-------------------|-----------------|---------------------|--------------------|---------|-----------------------------|
| Code SR100002 | Q Na | n AB @ ← · me Service job | $\leftarrow \rightarrow$ | → © Date | 30/04/13 | | | | | 4, | 1FG 🕞 🕞 🥒 🧬 🖄 🔿 |
| Main | Additional | Job Card | Transa | ctions Service R | equests Custo | m Not | es | Email Tracker | IPM Reconciliation | Related | |
| Profit centre 01 | 01 Q Admin | nistration 01 Q | V Di | splay Closed Jobs | | | | | | | Write off costs |
| Branch A | uckland | | | | - Open - 02/04/15 | | | | | | Create plant charges |
| Value | 0.00 | Estimates Exist | | 0002-0001 0002-00 | 01 (Plumbing Services a | s quoted) - Close | d - 30/03/15 | 5 | | | Create stock transfer |
| Customer detail | | | | | 1.V 0002-0001-0001 (Ad | ditional plumbin | g fittings as i | id - Open - 30/03/1 | 5 | | Create sales invoice |
| Code IVO | C Alpha | IVO Q | | 0002-0001-000 | 02 (Concrete works) - C | losed - 30/03/15 | 5/15 | | | | Create sales credit note |
| Name Ivoclar T | est Customer | Q | | 0002-0002-000 | 1.V 0002-0002-0001 (Ad | ditional supply) | Open - 30/0 | 03/15 | | | Create sales great note |
| Delivery address | | ~ | | 0002-0002-000 | 2.V 0002-0002-0002 (Ad | diitonal works) - | Closed - 30/ | /03/15 | | | Create estimates |
| Delivery contact | | | | SR100002 Service J | ob - Open - 30/04/13 | | | | | | Create timesheets |
| Site contact | | | | | | | | | | | Create disbursements |
| New customer | Site address | Delivery address | | | | | | | | | Create purchase orders |
| Status | Active | | ~ | Job Summary | Customer Balances | | | | | | Create purchase invoice |
| Job manager | Cameron Co | ok | \sim | Number | Date | | | | | | Create sub job |
| Account manager | Chelsea Cor | k | ~ L | ast invoice 336 | 29/08/14 | | | | | | Create cash asymptot |
| Туре | Warranty Jo | b | \sim | Totals | Include Sub Jobs | | | | | | Create cas <u>n</u> payment |
| | | | | Sales | 2510.00 | | | | | | Shift Management |
| Decent in h | | | | Balance | 2510.00 | | | | | | Convert to Stock |
| Parent Job | 0002 | | Q | Costs Burchase orders | 1640.00 | | | | | | Print N7C Label |
| Charge bine | Standard Markup on | Cort | Q | Total costs | 1640.00 | | | | | | Philit NZC Laber |
| charge type | Markup on | cost | | WIP | 0.00 | | | | | | IPM |
| | | | | Margin 34.66 % | 870.00 | | | | | | |
| Activity group | Labour - Su | pport | \sim | (qq) | 15.00 | | | | | | |
| Invoice format | | | | | | \sim | | | | | |
| | | | | | | | | | | | |
| Ready | | | | | | IC Job 124 | of 130 | | | | |
| riculy | | | | | | 10100 124 | | | | | |

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

| G App | G Apps For Greentree Module Control | | | | | | | | | |
|---------|---|------|------|--|---------|--------------------------------------|----------|----------|-----------------|--|
| | 8 | | 10 5 | | | - Ap | ps 🚦 | | ମ୍ 🕹 🕼 💡 | |
| Enter N | Enter New Registration Code Install App Delete Inactive/Expired Apps Uninstall Apps For Greentree | | | | | | | | | |
| Code | Name | | | | Descr | ption | | Active | Expiry Date 🛛 🔺 | |
| 000000 | Apps For Greentree | Form | | | App U | sage information on Forms | | v | 31 December 2 | |
| 010001 | AR Sales Orders Ta | Ь | | | Tab in | Customer maintenance to display Sal | les Ord | v | 03 December 2 | |
| 010002 | IN Reorder Workber | nch | | | Invent | ory Reorder Workbench | | ~ | 31 December 2 | |
| 010003 | IN Min/Max Workbe | ench | | | Invent | ory Min/Max Workbench | | ~ | 31 December 2 | |
| 010004 | AR Sales History Ta | ьb | | | Tab in | Customer maintenance to display Sal | les Hisl | ~ | 31 December 2 | |
| 010005 | AR Pricing Tab | | | | T ah in | Customer maintenance to display Priv | nina | | 31 December 2 | |

- 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.

| GT | Show Clo | sed Jobs Control | _ | | \times |
|----|------------------|------------------|---|----|----------|
| | | C 😤 🤜 AFG 🤅 | | 81 | 0 |
| | Default show clo | sed jobs | | | |
| | | | | | |