VERSION 1.0

FEBRUARY 4, 2019

Apps for Greentree

CUSTOMER ALERTS

APP NUMBER: 010143

Powered by:

MYOB Greentree

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FEATURES

1. **Customer Alerts.**

   This app will display alerts in Sales Order entry or CRM Quote entry when a customer is selected. Alerts are set up in Customer Maintenance.

   A system script is available for mass loading alert text.

   For Verde customers currently using Verde Sales Notes, a conversion script can be made available.

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.
- If you have existing Verde Notes you can run the conversion script. If the App is turned off or expires the Verde Notes will no longer be available.

OTHER REQUIREMENTS

Greentree Modules: Account Receivable, Sales Orders, CRM

Associated Apps: None.

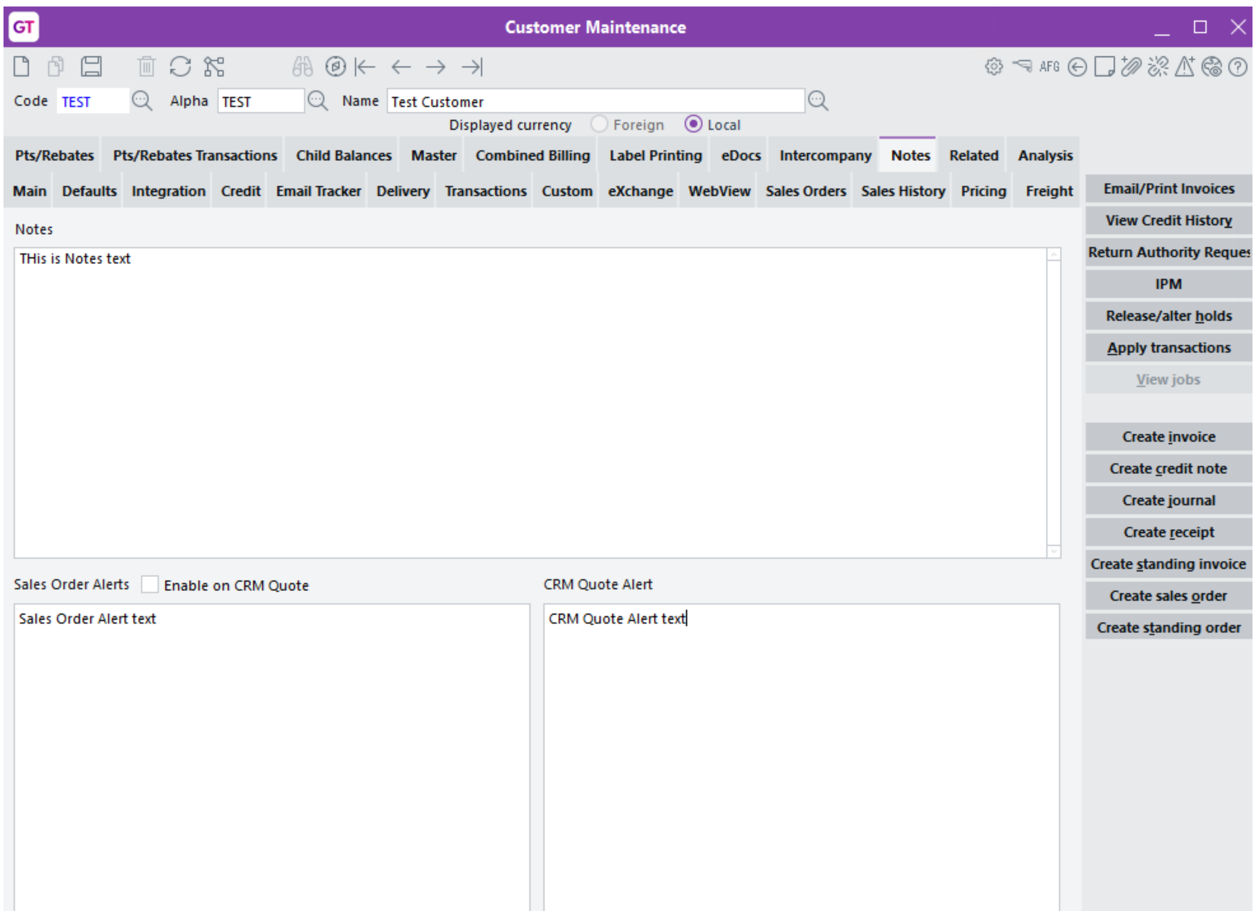
USER INSTRUCTIONS

CUSTOMERS

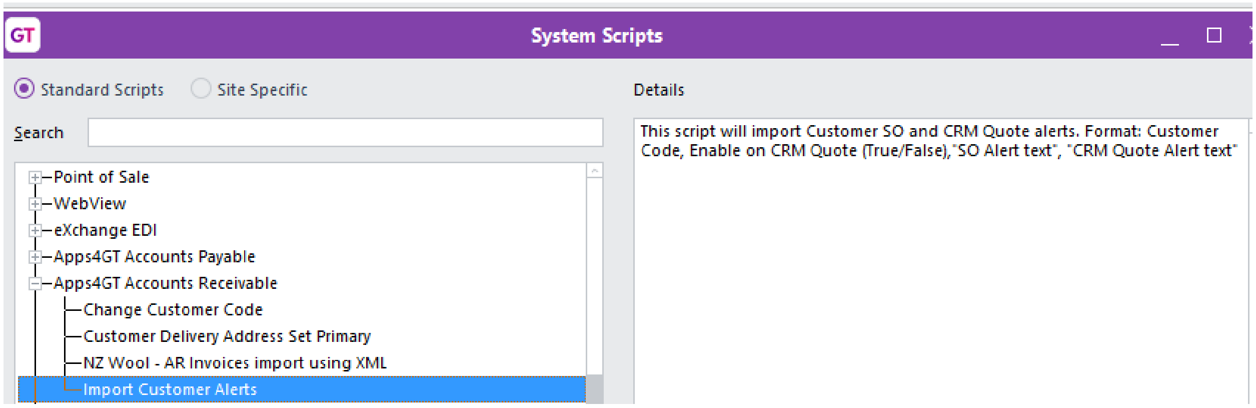
Within the menu option Data Entry | Accounts Receivable | Maintenance |Customer Maintenance, function, there is a standard Notes tab. With the App activated this screen will have two additional fields for entering alerts text.

The Sales Order Alerts will be displayed in Sales Order Entry.

The same text can display in CRM Quote entry, by using the Enable on CRM Quote checkbox, alternatively different text can be used in CRM Quote entry



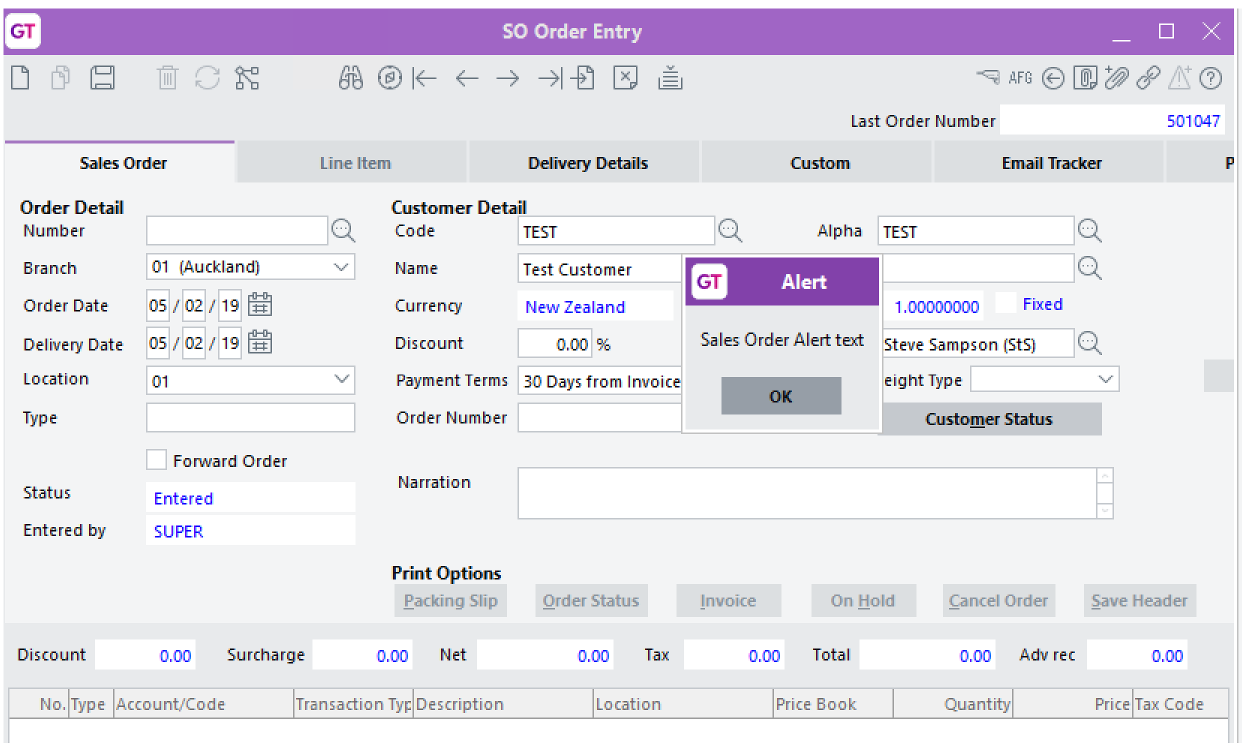
Note that a mass load script is available to populate the Sales Order Alerts and CRM Quote Alerts, and optionally enable Sales alerts to be used on CRM Quotes.



SALES ORDERS

1. Select the menu option Data Entry | Sales Orders | Sales Order Entry.
2. Select the Customer Code.

Instant alert message will pop up.



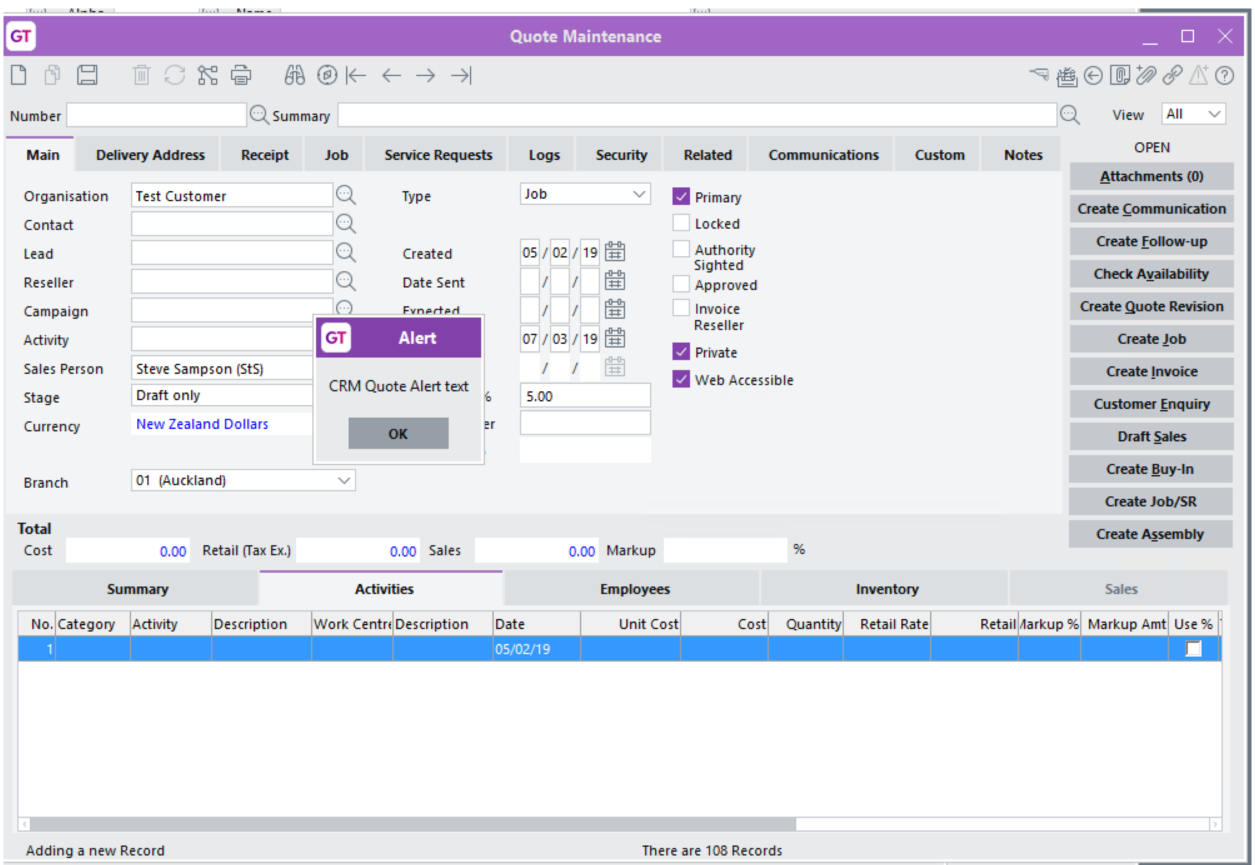
CRM QUOTES

1. Select the menu option CRM | Sales & Marketing | Quotes.
2. Select the Organisation Code.

A quote is entered for a CRM Organisation. A Contact can be used to find the Organisation.

Customer organisations are organisations of relationship type *Customer* and have a linked Greentree Customer.

If the linked Customer has Sales Alerts enabled for CRM Quotes or separate CRM Alerts, the Instant Alert message will pop up.

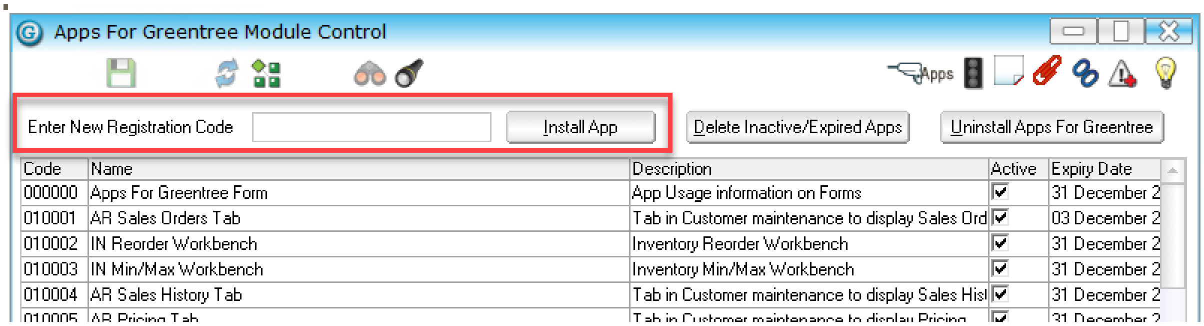


IMPLEMENTATION GUIDE

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 Customer Alerts App.
5. Click on the Edit Users button and select the users who will be configured to use Replace, for which companies.
6. Save and Close the form.