VERSION 1.0 FEBRUARY 4, 2019

Apps for Greentree

CUSTOMER ALERTS

APP NUMBER: 010143

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	2
Important Notes	2
Other Requirements	2
User Instructions	3
Customers	3
Sales Orders	1
CRM Quotes	1
Implementation Guide	5
APP INSTALLATION	5

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

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Code TEST C Alpha TEST Name Test Customer		
Displayed cu	rrency 🔿 Foreign 💿 Local	
Pts/Rebates Pts/Rebates Transactions Child Balances Master Combine	ed Billing Label Printing eDocs Intercompany N	otes Related Analysis
Main Defaults Integration Credit Email Tracker Delivery Transactions	Custom eXchange WebView Sales Orders Sales	History Pricing Freight Email/Print Invoices
Notes		View Credit History
THis is Notes text		Return Authority Reques
		IPM
		Release/alter <u>h</u> olds
		Apply transactions
		<u>V</u> iew jobs
		Create <u>i</u> nvoice
		Create <u>c</u> redit note
		Create journal
		Create <u>r</u> eceipt
		Create standing invoice
Sales Order Alerts Enable on CRM Quote	CRM Quote Alert	Create sales <u>o</u> rder
Sales Order Alert text	CRM Quote Alert text	Create standing order

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.

GT System Scripts								
Standard Scripts Site Specific	Details							
Search	This script will import Customer SO and CRM Quo Code, Enable on CRM Quote (True/False), 'SO Ale	ote alerts. Format: Customer ert text", "CRM Quote Alert text"						
⊕–Point of Sale	<u>~</u>							
-WebView								
-eXchange EDI								
-Apps4GT Accounts Payable								
-Apps4GT Accounts Receivable								
-Change Customer Code								
-Customer Delivery Address Set Primary								
-NZ Wool - AR Invoices import using XML								
Import Customer Alerts								

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.

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Sales Or	der	Line Item	Delivery Details	Custom	Email Tr	acker P
Order Detail Number	01 (Auckland)	Customer Det	ail TEST	ି Alpha	TEST	
Order Date Delivery Date	05 / 02 / 19 🛱 05 / 02 / 19 🛱	Currency	New Zealand	GT Alert Sales Order Alert text	1.00000000 Fixed Steve Sampson (StS)	
Location	01	 Payment Terms Order Number 	30 Days from Invoice	ОК	eight Type Custo <u>m</u> er Status	~
Status Entered by	Forward Order Entered SUPER	Narration				 ↓
		Print Options Packing Slip	Order Status	Invoice On Ho	old <u>C</u> ancel Order	Save Header
Discount	0.00 Surcharge	0.00 Net	0.00 Tax	0.00 Total	0.00 Adv re	ec 0.00
No. Type Acc	count/Code Tra	insaction Typ Description	Location	Price Book	Quantity	Price Tax Code

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.

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Main [Delivery Addres	ss Receipt	Job	Service Request	s Logs	Security	Related	Communicat	ions Custom	Notes	OPEN
Ormaniantia	Test Cust		0	Ture	lah	×					<u>A</u> ttachments (0)
Contact	in Test Cust	omer		type	100		Primary Locked				Create Communication
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Reseller			Q	Date Sent		/ ∰	Sighted Approved				Check Availability
Campaign			\odot	Evnerted	1	/ ₩	Invoice				Create Quote Revision
Activity			GT	Alert	07 / 03 /	/ 19 🛱	Reseller				Create Job
Sales Person	n Steve San	npson <mark>(</mark> StS)	CRM	Junto Alextant	/ /		Web Acces	ssible			Create Invoice
Stage	Draft only	у	CRIVIC	Juote Alert text	6 5.00						Customer <u>E</u> nquiry
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Branch	UT (AUCK	iariu)	~								Create Job/SR
Total											Create Assembly
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	Summary		Ac	tivities		Employee	s		Inventory		Sales
No. Catego	ory Activity	Description	Work Ce	ntreDescription	Date	Unit Co	ost Cos	t Quantity	Retail Rate	Retail /larkup	% Markup Amt Use %
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<											2
Adding a ne	ew Record					The	re are 108 Reco	ords			

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

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	8		ão 💰			Apps	🗔 d	9 💪 🔬 💡
Enter N	ew Registration Code	•		Install App		Delete Inactive/Expired Apps	nstall App	s For Greentree
Code	Name				Descr	iption	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 Sales Or	d 🔽	03 December 2
010002	IN Reorder Workbe	nch			Invent	ory Reorder Workbench		31 December 2
010003	IN Min/Max Workbe	ench			Invent	ory Min/Max Workbench	V	31 December 2
010004	AR Sales History Ta	ıb			Tab in	Customer maintenance to display Sales Hi	si 🔽	31 December 2
010005	AR Pricing Tab				T ah in	Customer maintenance to display Pricing		21 December 2

- 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.