

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.....	4
CRM Quotes.....	4
Implementation Guide.....	6
APP INSTALLATION	6

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

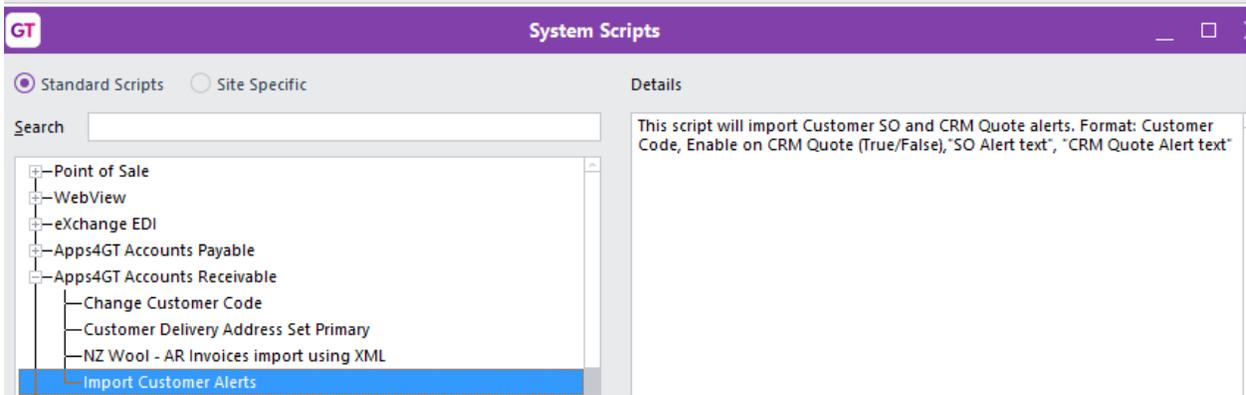
Within the menu option [Data Entry | Accounts Receivable | Maintenance | Customer Maintenance](#), function, there is a standard Notes tab. With the App activated this screen will have two additional fields for entering alerts text.

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

The screenshot displays the 'Customer Maintenance' window. At the top, there is a search bar with 'Code TEST', 'Alpha TEST', and 'Name Test Customer'. Below this is a navigation menu with tabs for 'Notes', 'Related', and 'Analysis'. The 'Notes' tab is active, showing a text area with 'This is Notes text'. Below the notes area, there are two sections: 'Sales Order Alerts' with a checkbox 'Enable on CRM Quote' and a text area 'Sales Order Alert text'; and 'CRM Quote Alert' with a text area 'CRM Quote Alert text'. On the right side, there is a vertical toolbar with buttons for 'Email/Print Invoices', 'View Credit History', 'Return Authority Request', 'IPM', 'Release/alter holds', 'Apply transactions', 'View jobs', 'Create invoice', 'Create credit note', 'Create journal', 'Create receipt', 'Create standing invoice', 'Create sales order', and 'Create standing order'.

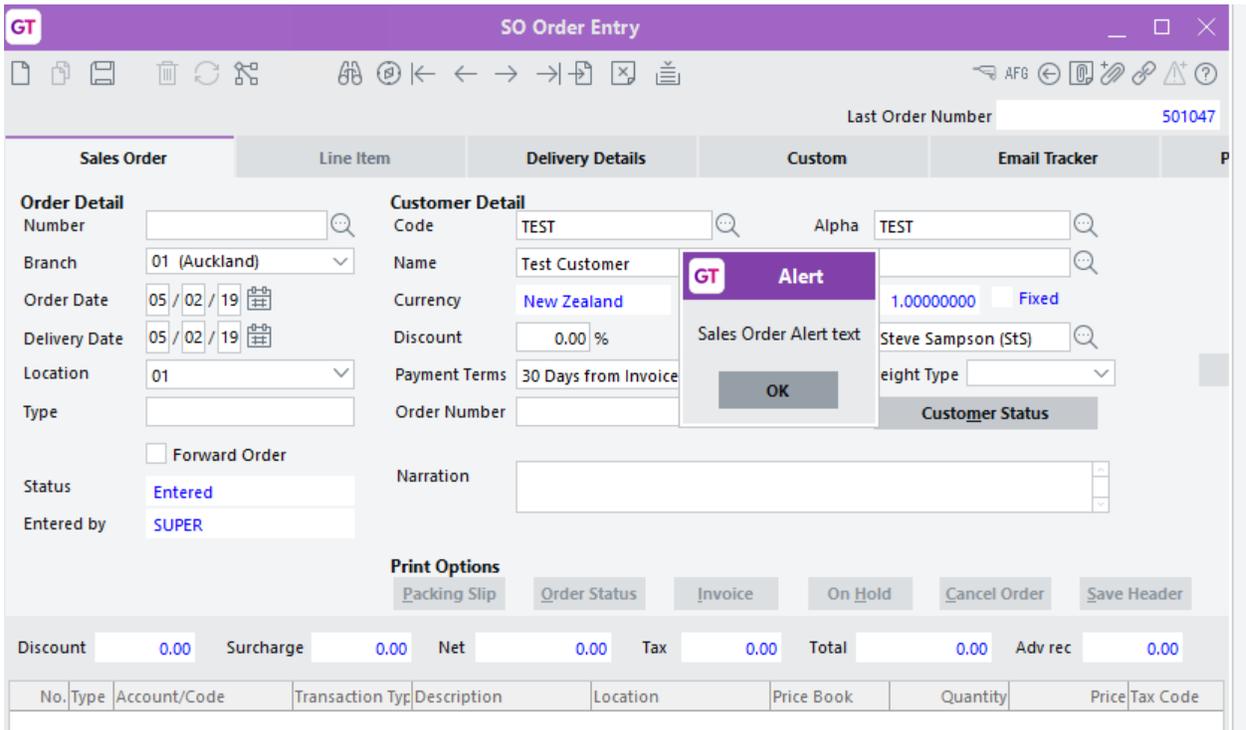
Note that a mass load script is available to populate the Sales Order Alerts and CRM Quote Alerts, and optionally enable Sales alerts to be used on CRM Quotes.



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.

The screenshot shows the 'Quote Maintenance' window in the Greentree CRM system. The interface includes a top navigation bar with the 'GT' logo and a search bar. Below the search bar, there are tabs for 'Main', 'Delivery Address', 'Receipt', 'Job', 'Service Requests', 'Logs', 'Security', 'Related', 'Communications', 'Custom', and 'Notes'. The 'Main' tab is active, displaying various fields for quote management, such as 'Organisation' (Test Customer), 'Contact', 'Lead', 'Reseller', 'Campaign', 'Activity', 'Sales Person' (Steve Sampson (StS)), 'Stage' (Draft only), 'Currency' (New Zealand Dollars), and 'Branch' (01 (Auckland)).

An 'Alert' popup is visible in the center of the screen, with the text 'CRM Quote Alert text' and an 'OK' button. The popup has a purple header with the 'GT' logo and the word 'Alert'.

At the bottom of the window, there is a table with columns for 'Summary', 'Activities', 'Employees', 'Inventory', and 'Sales'. The table contains one row with the following data:

No.	Category	Activity	Description	Work Centre	Description	Date	Unit Cost	Cost	Quantity	Retail Rate	Retail Markup %	Markup Amt	Use %
1						05/02/19							

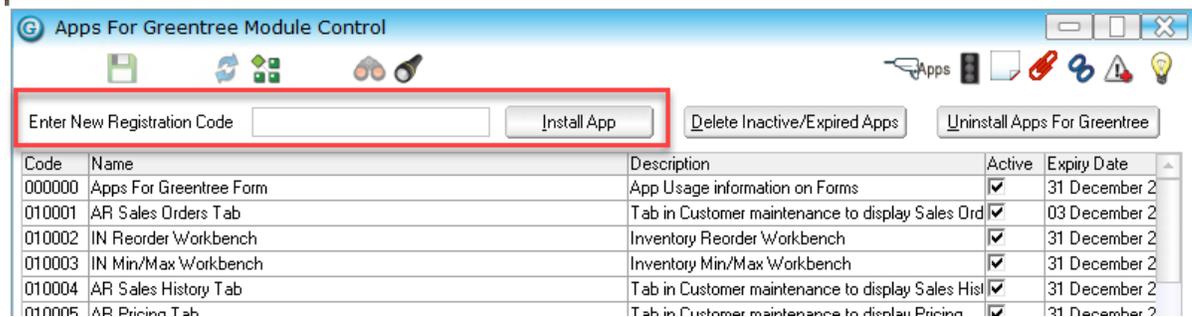
At the bottom of the window, there is a status bar that reads 'Adding a new Record' and 'There are 108 Records'.

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.