VERSION 1.0

NOVEMBER 23, 2017

Apps for Greentree

TRANSACTION USER DEFINED FIELDS

APP NUMBER: 010006

Powered by:

MYOB Greentree

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FEATURES

1. **Transaction User Defined Fields**

   Do you want to capture additional fields on an invoice, sales order, credit note, or a journal? Or any document dealing with customer, supplier, inventory or GL accounts?

   This App lets you create any number of additional user defined fields and then say which screens you want them to appear on. You can even flag them as mandatory, so the record can't be saved until the field has been completed. User Defined Fields are available to the Report Writer, Greentree Explorer, Work-flow Desktop panels and the Alerts and Approvals module, so your options for using the new data are virtually limitless.

   The App adds a "Custom" tab to most transaction entry screens, which contains your user defined fields.

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

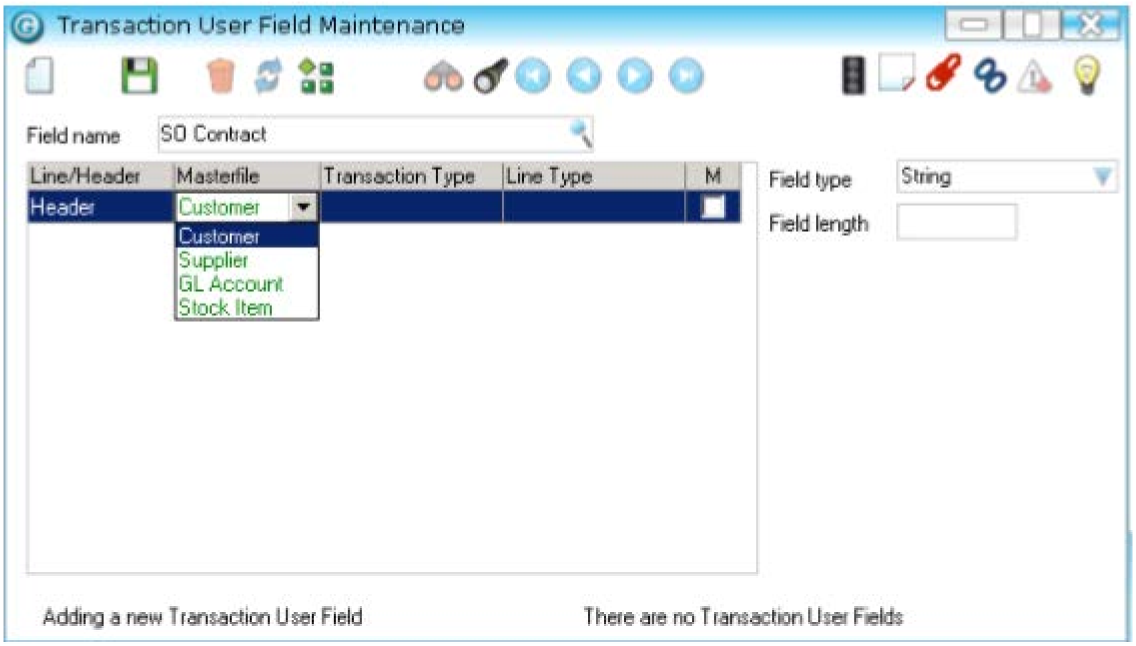
Greentree Modules: General Ledger, Accounts Payable, Accounts Receivable, Inventory, Sales Orders, Purchase Orders.

Associated Apps: None

USER INSTRUCTIONS

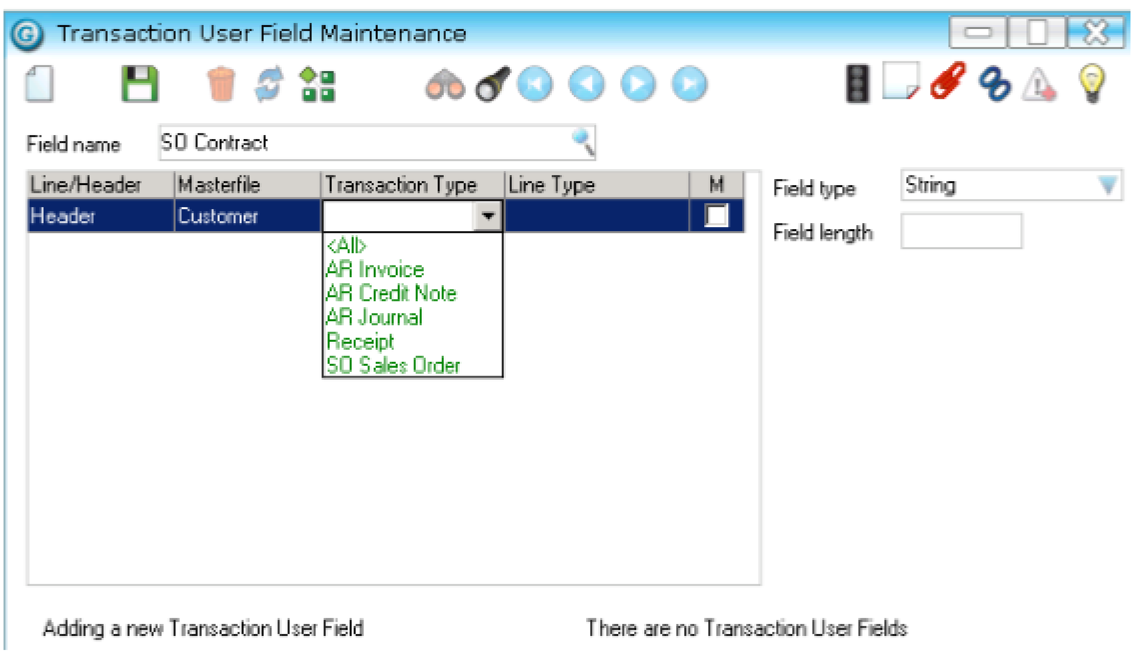
INSTRUCTIONS

System | System setup | Transaction UDF Maint



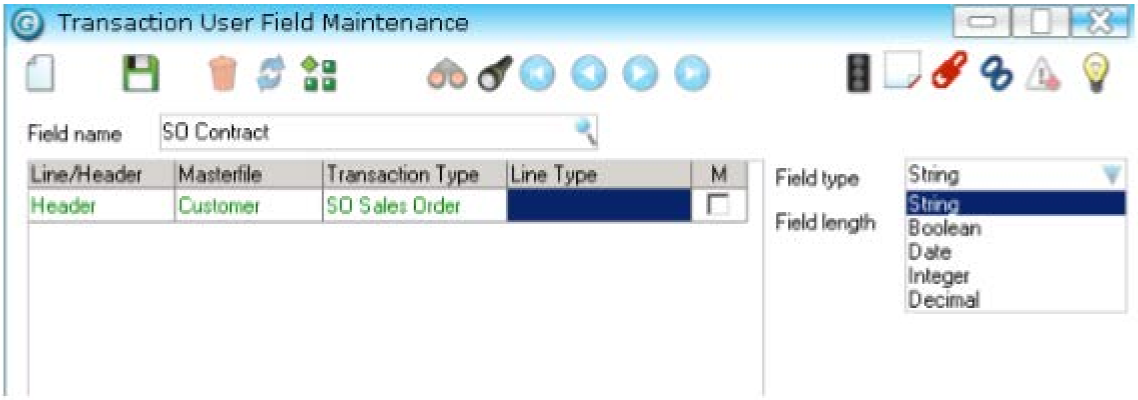
Type a name for the field – should indicate what it is used for.

Select the Masterfile that the field is applicable to.

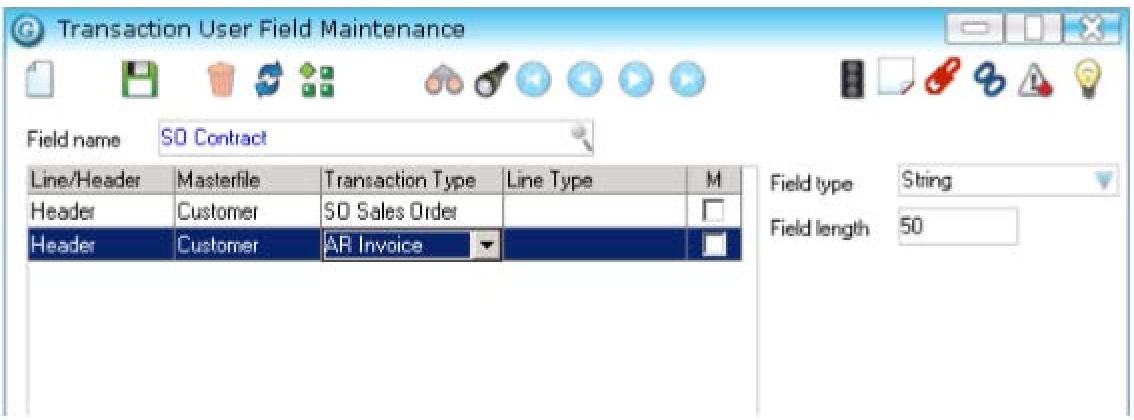


Select the transaction type the field will be used on

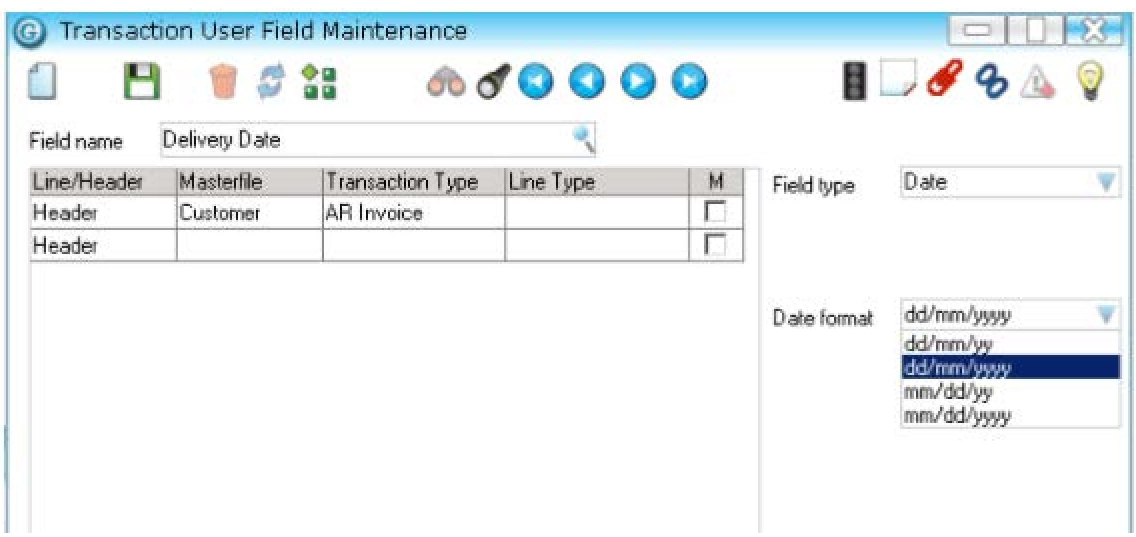
If the field is Mandatory, then check the M column.



Select the type of field required. If the field type is string you need to enter the maximum length for the field.

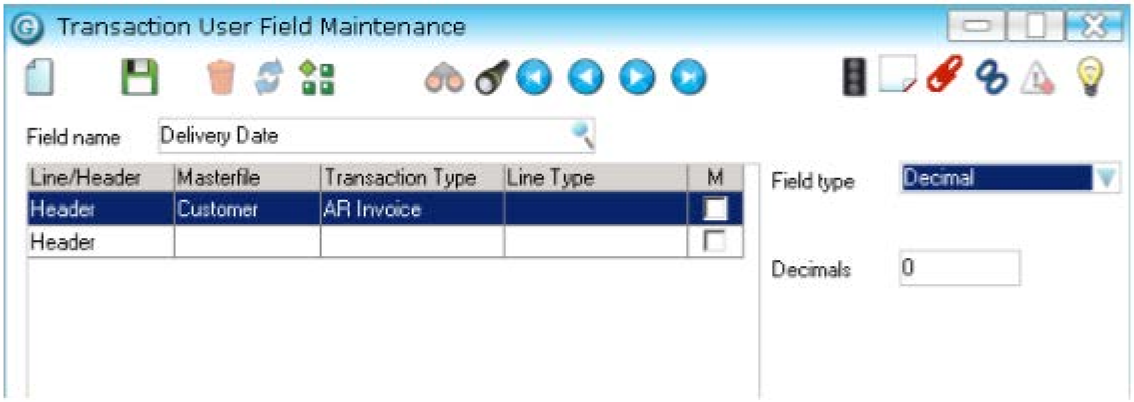


A single field can be applied to multiple transaction types by adding a line for each type it is to be used with.



You can have multiple different UDF against the same transaction type.

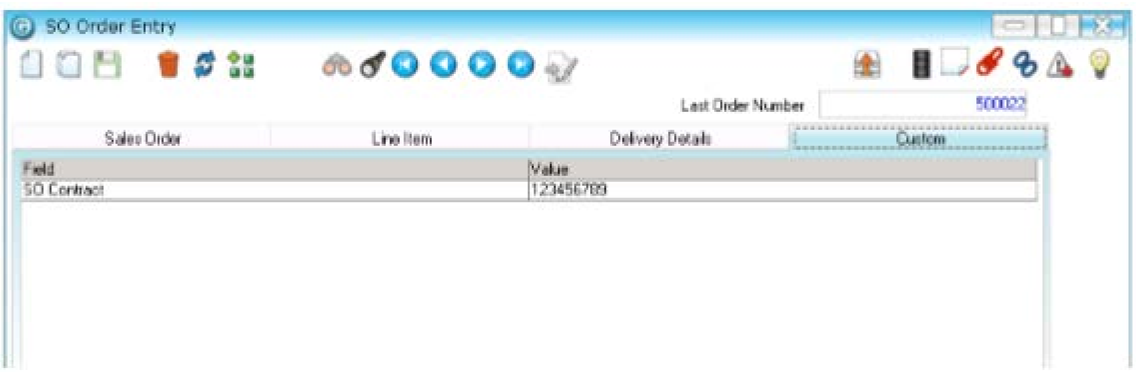
If the field is of type Date then you can select the date format to be used.



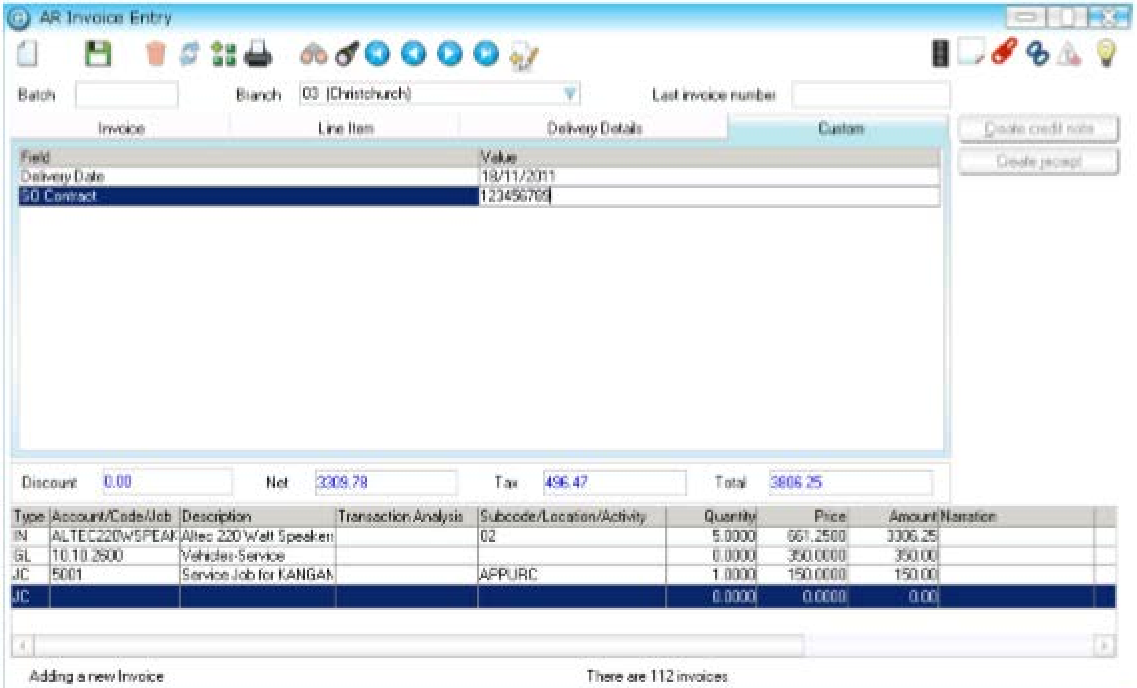
If a field is a decimal you will be asked for the number of decimal places you want the entered number to be stored to.

Transaction Entry

Your UDF will appear on an additional tab in which ever data entry program is applicable based on the definition of your field.

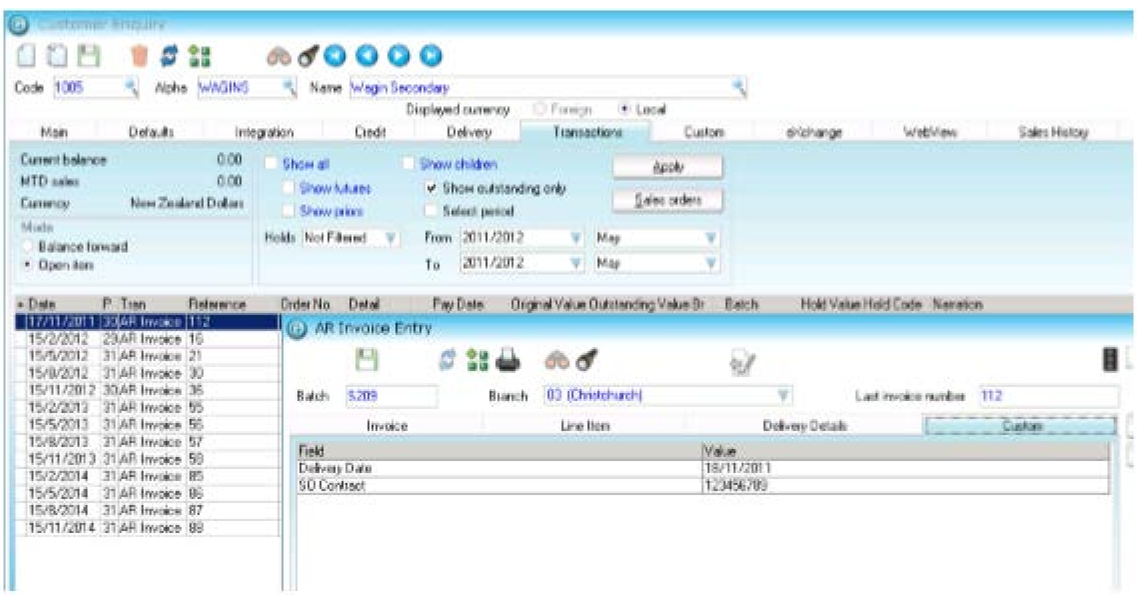


You must manually go to the tab and enter the values next to the fields defined.



This does not limit the type of lines that can be entered into the transaction.

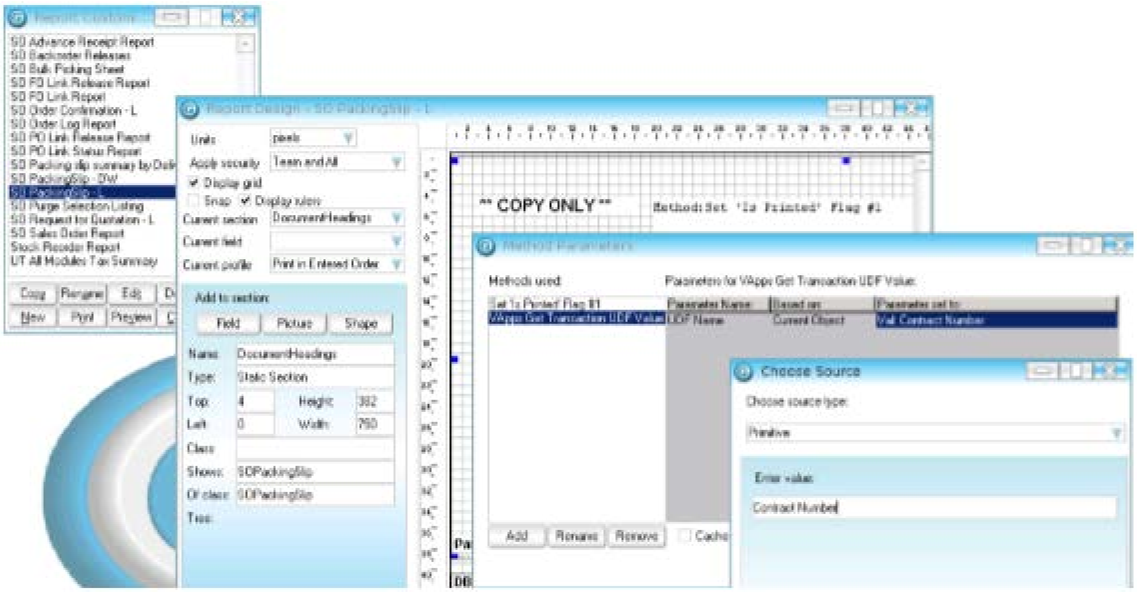
Recalling Values



When you recall a transaction the UDF values are still visible

Report Writer

Under Customization, Report you can add the fields.

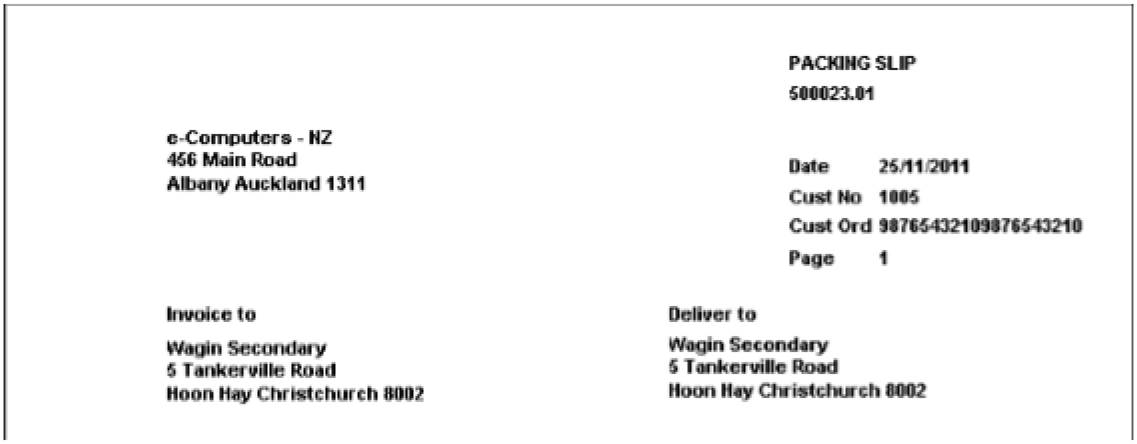


There is a new method field that can be added to any section based on the same class as the UDF.

VApps Get Transaction UDF Value

This method should be setup as a primitive and the name of the UDF entered.

The method field is then added to the report for printing.



PACKING SLIP
500023.01

e-Computers - NZ
456 Main Road
Albany Auckland 1311

Date 25/11/2011
Cust No 1005
Cust Ord 98765432109876543210
Page 1

Invoice to

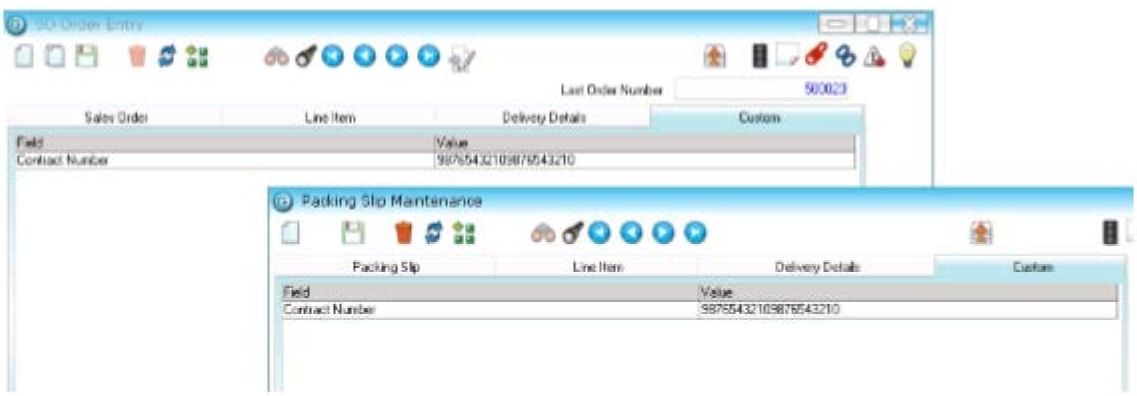
Wagin Secondary
5 Tankerville Road
Hoon Hay Christchurch 8002

Deliver to

Wagin Secondary
5 Tankerville Road
Hoon Hay Christchurch 8002

UDF Value Pass Through

If you enter a value on a transaction that is then used to create another one, the value should pass to the other transactions.

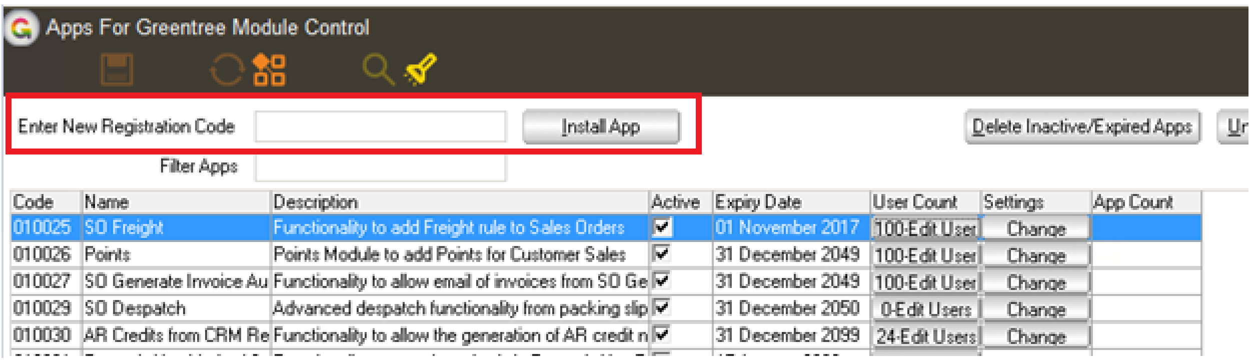


IMPLEMENTATION GUIDE

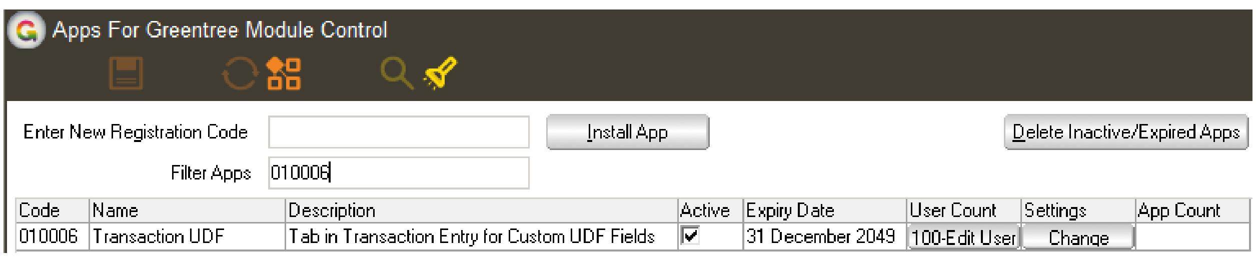
Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

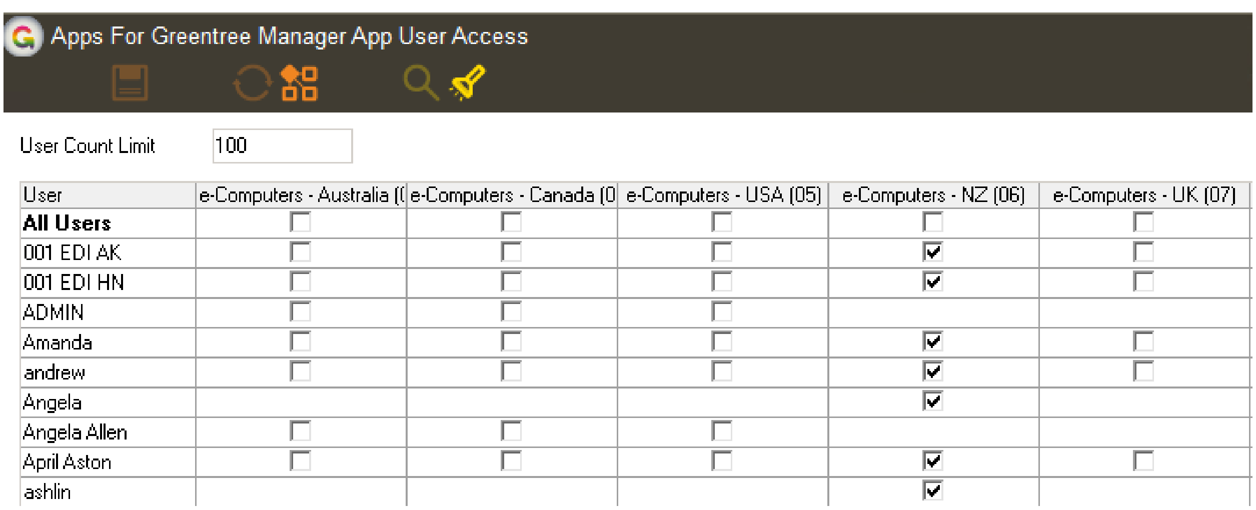
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Transaction User Defined Fields App.



5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.



6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.
7. Save and Close the form.