VERSION 1.0 NOVEMBER 23, 2017

Apps for Greentree

SEND MULTIPLE COPY INVOICES FROM CUSTOMER MAINTENANCE

APP NUMBER: 010010

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	2
Important Notes	2
Other Requirements	2
User Instructions	
Sending a communication	Error! Bookmark not defined.
Implementation Guide	5
App Installation	5

FEATURES

1. Send Multiple Copy Invoices from Customer Maintenance

Do your customers often ask for a copy of all their outstanding invoices? We bet they do, and it probably adds several hours work to your month end!

This App adds a new Email/Print Invoices button to the Customer Maintenance and Enquiry screens. When clicked a new Invoice Copy Email/Print window appears allowing invoices to be selected for emailing or printing.

Options

- 1. Display a list of just the outstanding invoices and credit notes or all invoices and credit notes for a customer
- 2. Select all or choose individual invoices
- 3. Combine invoices into a single PDF email attachment or attach a separate PDF per invoice
- 4. Configure a Default Note (email message body) and Signature to appear on the email NB: these fields are TEXT only

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: Accounts Receivable

Associated Apps: None

USER INSTRUCTIONS

INSTRUCTIONS

- 1. Open the Accounts Receivable Customer Maintenance or Customer Enquiry screen
- 2. Select the Customer for whom you want to email or print invoices
- 3. Click on the Email/Print Invoices button

Customer	Enquiry IIIO# Q.✔(. 20	08 6.0
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Freight	Sales Hatory Sales Orders	WebView	Notes	Falated	Analysis	
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A new screen appears:

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ale	ITon	Reterence	Period	Pay Date	Original Value	Jutatanding[Date: No	Planation	Select	Densite: Al
6/4/2011	AR Invoice	10	30/4/2011	25/5/2011	2,832,91	1,632,91,4654	Kangan Education Unit	E .	
0/12/2010	AR Invoice	101	31/12/2013	19/1/2014	6,458.20	6.468.70	Kergen Education Unit	- C	
/12/2014	API Invoice	102	31/12/2014	15/1/2015	7,782.44	7,762.44	Kangan Education Unit	C	Enst
/5/2011	AR Invoice	109	31/5/2011	9/6/2011	1,128.41	1,128.41	Kangan Education Unit	E I	
6/2011	AR Invoice	11	30/6/2011	2/2/2011	8.44	8.44 5300	Kangah Education Unit	1	
/8/2012	API Invoice	600020	30/9/2012	27/16/2012	358.00	358 80(4510801	Coursed by XNZ Courses	E	
1/5/2011	AR Invoice	9	31/5/2011	22/6/2011	524.00	\$24.80(5008	Kangan Education Unit	1	
ioni • Emai	Cont	ine krysices				Note			

4. Select the invoices you want to email or print using the following controls:

Outstanding only	Tick Outstanding only to restrict the list of Invoices to those that have an outstanding value. Un-tick to show all Invoices for a customer whether they have been paid
Select Column	Tick the box in the Select Column beside each record you want to email or print
Select All button	Selects all records, placing a tick in the Select column beside each invoice
Deselect All	Button Un-ticks all records

Date.	Tran	Betwence	Period	PayDale	Original Value	Outstanding Order No.	Random	Select
26/4/2011	AR Invoice	10	30/4/2011	26/5/2011	2,832.91	1,632.91 4654	Kangan Education Unit	12
20/12/2013	AFI Invoice	101	31/12/2013	19/1/2014	5,463.70	6.456.70	Kangan Education Unit	P
20/12/2014	AR Invoice	102	31/12/2014	19/1/2015	7,762.44	7,762.44	Kangan Education Unit	9
10/5/2011	AR Invoice	100	31/5/2011	9/6/2011	1.120.41	1,128.41	Kangan Education Unit	1
2/6/2011	AR Invoice	11	30/6/2011	2/7/2011	8.44	8.44(5290)	Kangan Education Unit	0

5. Choose the output method Options:

Email	The invoices will be emailed
Combine Invoices	Tick the box to combine invoices in a single PDF email attachment. Un-tick to attach a PDF per invoice
Note	Enter the body text for the email that that will accompany the invoices. This field is not used when invoices are printed
Print	The invoices will be printed
Printer drop-down	Select the printer to print to from the drop-down menu

6. Click on the Email / Print button at the right of the screen to complete the process Note: The wording on the button changes depending on the option chosen at step 5

and the second second	il Message	- + ×
To Cc Bcc	email@kangan.com	
Subject	e-Computers - NZ. Customer:Kangan Education Unit Copy Invoice	e/s
Please fin Regards, April	d attached the invoices you requested.	
File Name	File Path File Size	
10_Copy2 101_Copy 102_Copy	67.4K 66.5K	

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	rs For Greentree Mod	ule Control B Q 🖋					
Enter Ne	ew Registration Code	Install App			0	Delete Inactive	/Expired Apps
	Filter Apps						
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders		01 November 2017	100-Edit Use	Change	
010026	Points	Points Module to add Points for Customer Sales	V	31 December 2049	100-Edit Use	r Change)
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	•	31 December 2049	100-Edit Use	d Change	j i
010029	SO Despatch	Advanced despatch functionality from packing slip		31 December 2050	0-Edit Users	Change	1
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit r	v	31 December 2099	24-Edit Users	change)

4. Select/Highlight the Send Multiple Copy Invoices from Customer Maintenance App.

G App	os For Greentree M	odule Control						
		88 Q 🖋						
Enter Ne	ew Registration Code		Install App			<u>[</u>	<u>)</u> elete Inactive	/Expired Apps
	Filter Apps	010010						
Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count
010010	Email Copy Invoices	Functionality to email customer	invoice copies		31 December 2099	24-Edit Users	Change	

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

G Apps For Gre	eentree Manager App l	Jser Access			
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User Count Limit	100				
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All Users					
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ADMIN					
Amanda					
andrew					
Angela					
Angela Allen					
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- 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.

CONFIGURATION

From Greentree version 3D@3 (update pack Apps4GT3D@3-10) it is possible to configure a default note and a default signature to appear on all emails sent using the App.

- 1. Log in to Greentree as the Super user
- 2. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 3. Locate the Send multiple copy invoices from Customer Maintenance / Enquiry App in the list and click on the Change button beside it

		8 C	18			4	April .		
Enter N	ew Registration Code			Install App		Delete Inactive/Exp	eed Apps	Uninstal Apps	For Greenite
Code	Name	Description			Active	Expiry Date	User Count	Setings	
010001	AR Sales Orders Tab	Tab in Custom	er maintenance to d	isplay Sales Ox	di P	20 August 2013	24Edi Users		
010002	IN Reorder Workbench	Inventory Rea	rder Workbench		R	07 August 2013	24-Edit Users	Change	
010004	AR Sales History Tab	Tab in Custom	er maintenance to d	isplay Sales His	N.	29 November 2013	24-Edit Users		
010005	AR Pricing Tab	Tab in Custom	er maintenance to d	isplay Pricing	(F	15 February 2014	24-Edit Users	· · · · · · · · · · · · · · · · · · ·	
010006	Transaction UDF	Tab in Transa	ction Entry for Custor	n UDF Fields	P	31 October 2013	24-Edit Users		
010008	Utility System Scripts	A collection of	useful scripts for imp	orting and exp	- V	07 August 2013	24-Edit Users		
010009	Copy Clever Table Settin	A Utility that all	lows copying of clev	er table setting	1	04 January 2014	24-Edit Users		
010010	Email Copy Invoices	Functionality to	o email customer invo	nice copies	2	27 September 2013	24-Edit Users	Change	
010011	Snap Shot Workbench	Create Snap	Const Const	International Property in the	Andre Che	46.0	-		1000 1000
010012	IN Pricing Workbench	Inventory pric	Contrast Copy	invoices Mo	dule Co	retol			-
010013	Copy GL Journal	Allows copyin		10.2	9	0 🛃			BUK (
010015	System Script Security	Set Security	-	<u> </u>		1000			
010017	Copy User Settings	A Usiky that -	C. Badarde Courbin	in the second second					
010021	WIP Reconciliation	Functionality	 Densur Contex 	NE SUVOCES					
010022	Object Drill Down	Functionality	Default Notes	Test Note					
010024	Stock Reconciliation	Functionality		Line 2					
010025	S0 Freight	Functionality							
010026	Points	Points Modul							
010027	SD Generate Invoice Au	Functionality	Signature	arigela rei	ly the opt	timiser			
10029	S0 Despatch	Advanced de							
10030	AR Credits from CRM Re	Functionality		SENIOR (CONSUL	TANT Zashendi tet Lauri Z	(Strates In	an Brend	
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- 4. If you wish to set as a default that invoices are combined into a single PDF before being emailed, click on the check-box for Default Combine Invoices
- 5. Enter the Default Notes and Signature you require. NB: these are TEXT only fields, and cannot contain images or formatting
- 6. Click on the Greentree Save Icon to Save and Close the window

Setting up a personal Email Signature for a user

Each user can set up a personal email signature which over-rides the default signature set up above.

- 1. Log in to Greentree as the user
- 2. Select the menu item | File | Preferences |
- 3. Click on the Email Signature Tab
- 4. Enter the Signature details
- 5. Click on the Greentree Save Icon to Save and Close the window