Apps for
Greentree

SEND MULTIPLE COPY INVOICES FROM CUSTOMER MAINTENANCE

APP NUMBER: 010010

Powered by:

MYOB Greentree

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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

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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
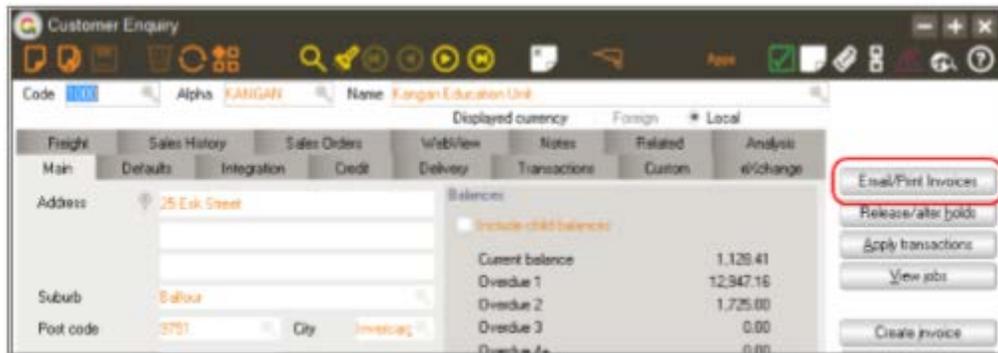
A new screen appears:

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	Reference	Period	Pay Date	Original Value	Outstanding	Order No	Narration	Select
26/4/2011	AR Invoice	10	30/4/2011	26/5/2011	2,832.51	1,632.91	4654	Kangan Education Unit	☑
20/12/2013	AR Invoice	101	31/12/2013	19/1/2014	6,460.70	6,460.70		Kangan Education Unit	☑
20/12/2014	AR Invoice	102	31/12/2014	19/1/2015	7,762.44	7,762.44		Kangan Education Unit	☑
10/5/2011	AR Invoice	100	31/5/2011	3/6/2011	1,120.41	1,120.41		Kangan Education Unit	☐
2/6/2011	AR Invoice	11	30/6/2011	2/7/2011	8.44	8.44	5390	Kangan Education Unit	☐

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

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 Send Multiple Copy Invoices from Customer Maintenance 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.

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
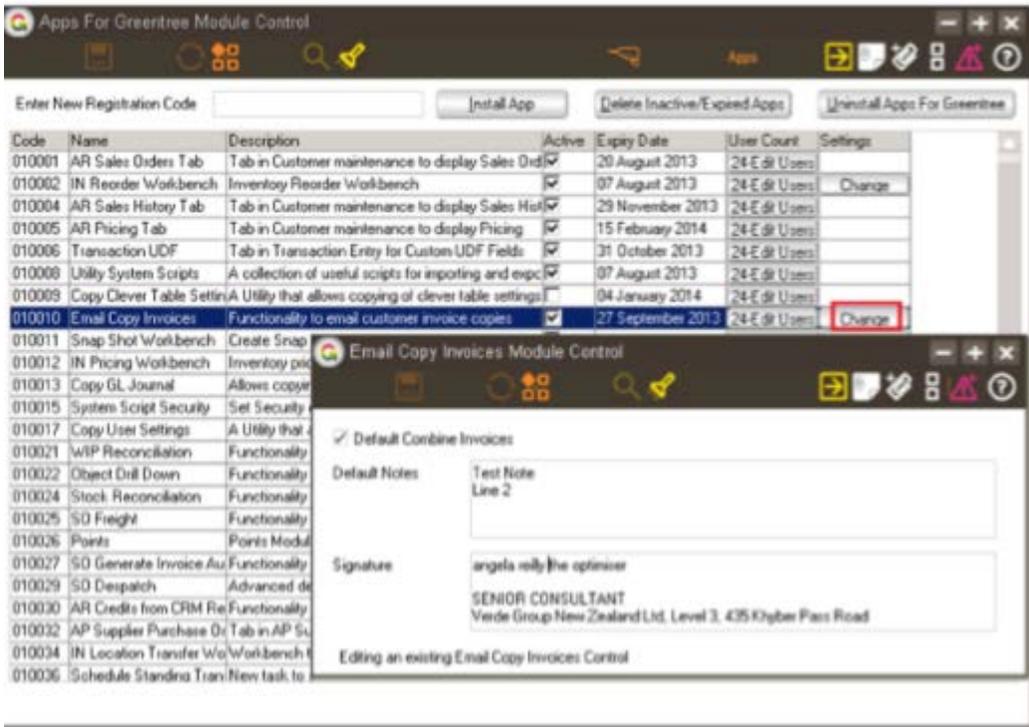
4. If you wish to set as a default that invoices are combined into a single PDF before being emailed, click on the check-box for Default Combine Invoices
5. Enter the Default Notes and Signature you require. NB: these are TEXT only fields, and cannot contain images or formatting
6. Click on the Greentree 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