VERSION 1.0 NOVEMBER 23, 2017

Apps for Greentree

SALES ORDERS TAB IN STOCK MAINTENANCE

APP NUMBER: 010019

Powered by:

MYOB Greentree

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FEATURES

1. Sales Orders Tab in Stock Maintenance

Why go to the Sales Order Enquiry screen to see what outstanding orders there are for a Stock Item?

This app lets you see them right from the Stock Maintenance and Enquiry screens.

- Select Sales Orders within a date range
- Select by Customer Code or Alpha, or search by name
- Select by a specific salesperson
- Select by the customer's purchase order number
- Show Orders with Outstanding and Backordered items
- Display Sales Orders based on tree and branch selections

It is quick and easy, and the Sales Order Enquiry is still only a click away for your more complex enquiries.

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: Inventory, Sales Orders

Associated Apps: None

USER INSTRUCTIONS

INSTRUCTIONS

- 1. Select the menu item | Data Entry | Inventory | Inventory Item Maintenance | or the menu item | Enquiry | Inventory | Inventory Items |
- 2. Select the Stock Item to view in the usual manner using arrow keys, entering a Code or Description, or using the Advanced Search.
- 3. Click on the Sales Orders tab



4. Refine your search by setting the Selection Criteria:

Man	Defaults	Transaction	ne Custom	No	xes Sales Or	ders)	Related	Analysis
Selection Crite	From		To		Name Search			
Date	1/1/2	002	31/12/2989					
Code			2222222222		Enter any number	of words or	partial word	ds.
	Use Alp	ha						
Salesperson	Sally Score	eby 🔍	Steve Sampso	n 🐨	Cust. Order Numb	er contains		
Branch	None	Y			Outstanding	Back	kordered	Al
Location			Clear Locat	ion			. Se	arch Now
ales Order	Order Date	Delivery	Date Cust Dr	der No.	Customer Code/Alpi	ha Cu	stomer Nam	e

Date From / To	Select records within a date range					
Code From / To	Select based on all, one or a range of Customer Codes					
Use Alpha	Tick this box and the Code Seach uses the Alpha field allowing the From and To field to be alphabetical					
Salesperson	Select based on all, one or a range of Salepeople					
Branch	Select a specific Branch					
Location	Select a specific Location					
Clear Location	Click this button to clear an entry in the Location box					
Name Search	Search for a customer based on part of their name					
Cust. Order Number Co	ntains Search based on the customer's order number					

Outstanding	Click this radio button to view just outstanding orders that meet the other selection criteria
Backordered	Click this radio button to view just items on backorder that meet the other selection criteria
All	Click this radio button to view all orders for the customer that meet the other selection criteria
Advanced	Click the Advanced button to open the Advanced Search Criteria window, where you may narrow the selection of records based on a Tree and its branches

G Advanced Search Criteria							
Line Type 🛛 🔍 🔍							
Inventory Tree Items by Manufacturer V	Select All Deselect All Acer All Aopen Gigabyte Gill Intel MSI All Netgear Zellows						

5. Click the Search Now button to show the records that match your selection criteria

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
- Select the menu item | System | Apps For Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App

G Apps For Greentree Module Control									
Enter Ner	w Registration Code	In	istall App			(<u>D</u> elete Inactive	/Expired Apps	U
	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	r Sales 🛛	¥	31 December 2049	100-Edit Use	r Change	1	
010027	SO Generate Invoice Au	Functionality to allow email of invoices fro	m SO Ge	~	31 December 2049	100-Edit Use	r Change	1	
010029	SO Despatch	Advanced despatch functionality from pa	cking slip	¥	31 December 2050	0-Edit Users	Change		
010030	AR Credits from CRM Re	Functionality to allow the generation of Al	R credit n	v	31 December 2099	24-Edit Users	Change	1	

4. Select/Highlight the IN Sales Order Tab App.

G Apps For Greentree Module Control									
Enter N	ew Registration Code	Install App		Delete Inactive/Ex	pired Apps	Uninstall App	os For Greentree		
Code	Name 🕮	Description	Active	Expiry Date	User Count	Settings	App Count		
010008	Utility System Scripts	A collection of useful scripts for importing and exp	. 🔽	06 October 2018	0-Edit Users	Change			
010025	SO Freight	Functionality to add Freight rule to Sales Orders	•	26 February 2018	100-Edit User	Change			
010057	Returns Authorities in Ac	Functionality to process Returned Stock in Accou	r 🔽	26 February 2018	100-Edit User	Change			
010022	Object Drill Down	Functionality to drill down on a object	•	26 February 2018	100-Edit User	1			
010019	IN Sales Orders Tab	Tab in Inventory Item maintenance to display Sale		26 February 2018	100-Edit User				
010020	IN Sales History Tab	Tab in Inventory Item maintenance to display Sale	. 🔽	26 February 2018	100-Edit User				

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 Greentree Manager App User Access									
	\odot $lpha$	Q 🚀							
User Count Limit	100								
User	e-Computers - Australia ((e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)				
All Users									
001 EDI AK				\checkmark					
001 EDI HN									
ADMIN									
Amanda									
andrew									
Angela									
Angela Allen									
April Aston									
ashlin				V					

- 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.