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.

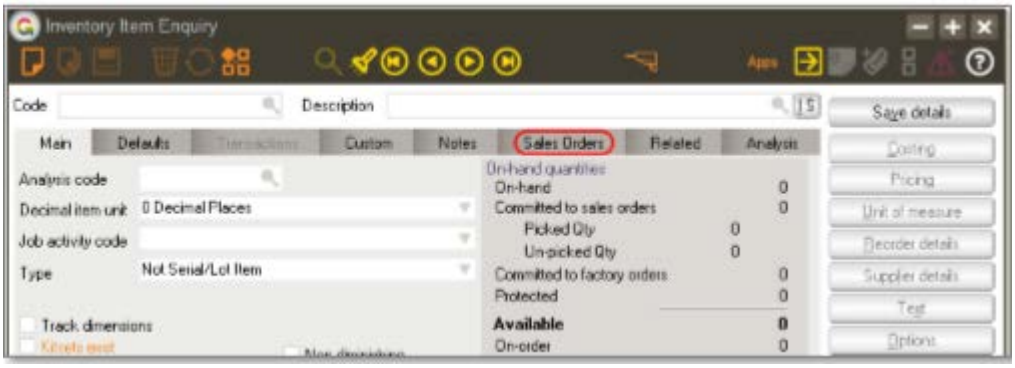
OTHER REQUIREMENTS

Greentree Modules: Inventory, Sales Orders

Associated Apps: None

INSTRUCTIONS

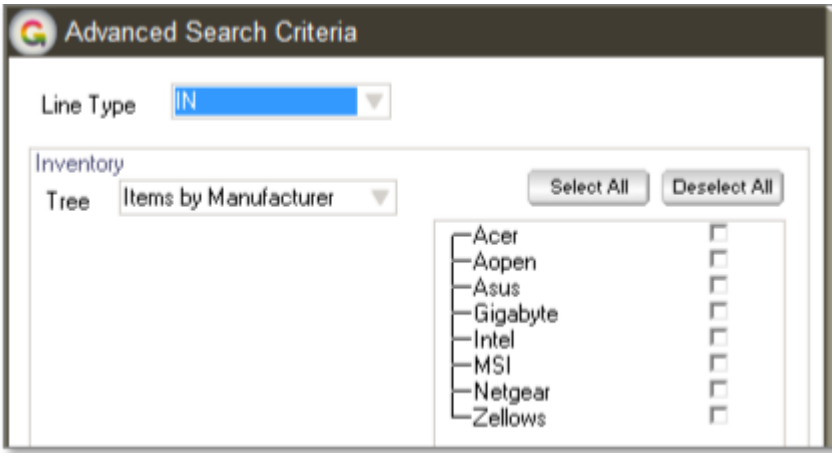
1. Select the menu item | Data Entry | Inventory | Inventory Item Maintenance | or the menu item | Enquiry | Inventory | Inventory Items |
2. Select the Stock Item to view in the usual manner using arrow keys, entering a Code or Description, or using the Advanced Search.
3. Click on the Sales Orders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



4. Refine your search by setting the Selection Criteria:

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 Contains	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



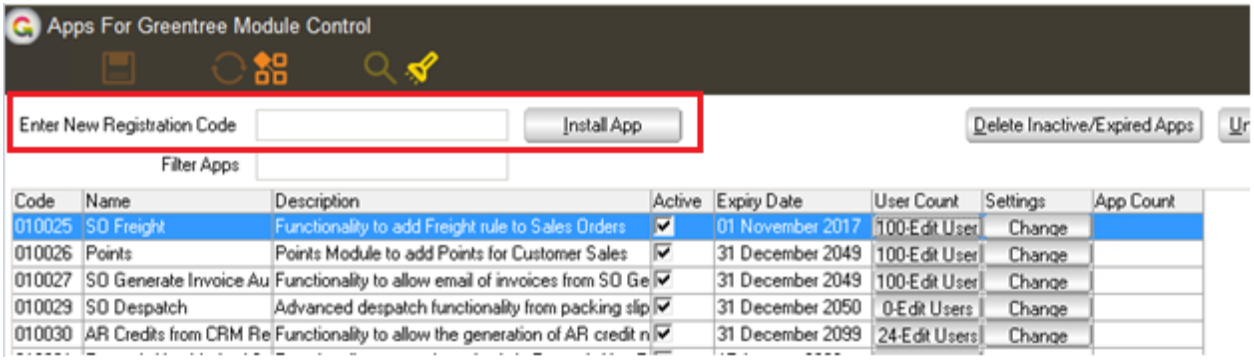
5. Click the Search Now button to show the records that match your selection criteria

IMPLEMENTATION GUIDE

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

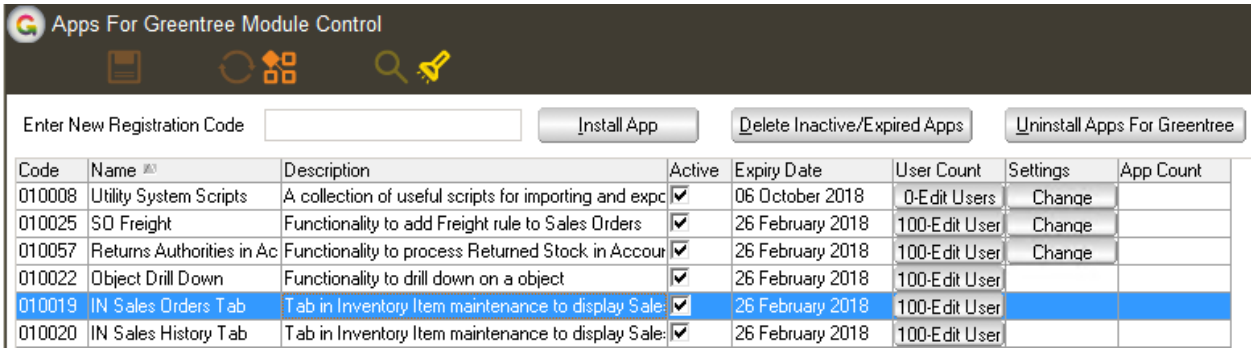
APP INSTALLATION

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



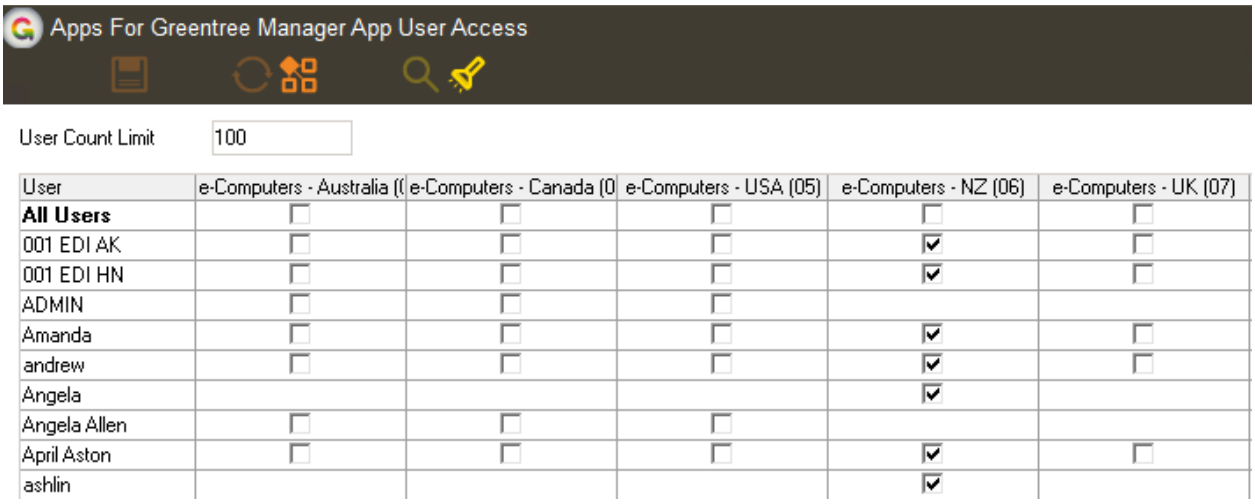
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	☑	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	☑	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	☑	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	☑	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	☑	31 December 2099	24-Edit Users	Change	

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



Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010008	Utility System Scripts	A collection of useful scripts for importing and expo	☑	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 Accour	☑	26 February 2018	100-Edit User	Change	
010022	Object Drill Down	Functionality to drill down on a object	☑	26 February 2018	100-Edit User		
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.



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.