JR.bizlink

A Word from the Editor

-Teresa Hooper

Profile - James Terrington - Manager - JR.Bizlink

JR.Bizlink

Screen Customisation....when your business wants to customise the information shown in a Greentree form

<div align="right">-James Terrington</div>

When working in commerce I remember many situations where:

- There were just too many fields on a form, and a lot were not used by our business;
- It would have been nice to have a user able to see a field, but not able to update it;
- The description against a field did not fit with the business environment and it would have been nice to be able to make it more appropriate.

Screen Customisation

Greentree's Screen Customisation module is designed to allow businesses to customise existing forms and in combination with the security module to associate these customised forms with either users or teams.

Example

To the right is an example of customising the standard SUPPLIER MAINTENANCE form and how it can then be applied to a specific user.

This is the standard SUPPLIER MAINTENANCE form within Greentree.

And a business requires:
- ADDRESS and CONTACT fields be made mandatory;
- WEB field not be shown;
- STATUS be changed to read SUPPLIER STATUS;

STEPS

1. From the menu select the CUSTOMISED FORMS SELECTION screen. This will display a listing of all the Greentree forms that can potentially be customised for a business.
2. Select ACCOUNTS PAYABLE > ACCOUNTS PAYABLE (this is the Supplier Maintenance form). Click ok COPY to create a new customised version of the form and enter a new name.

3. From the CURRENT PAGE field select MAIN SHEET. And then set Address1 text box, Address 2 text box, Address3 text box and Contact text box to all be Mandatory.

4. Change the Control type to be LABELS. Select label Status and change the caption to read Supplier Status.
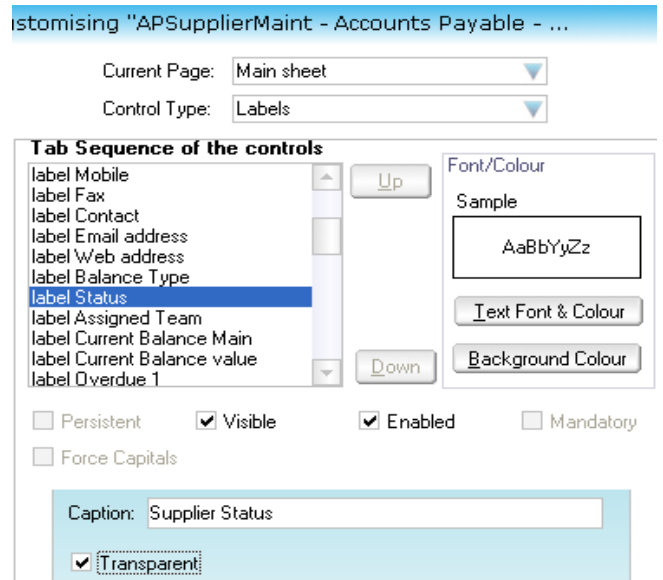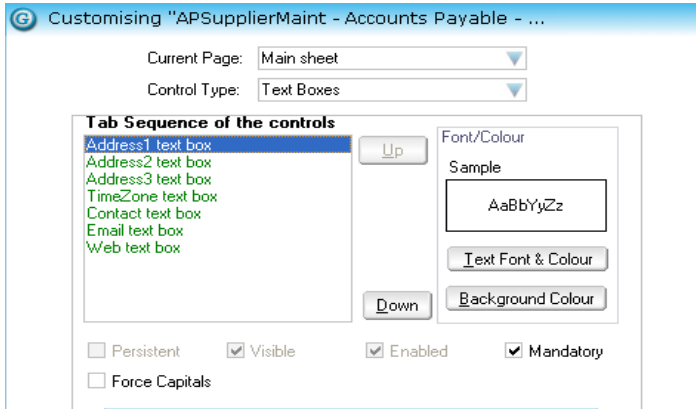
5. Against Web text box and Label Web Address unselect VISIBLE.

6. Save the changes, and this new customised form can now be applied to a user.
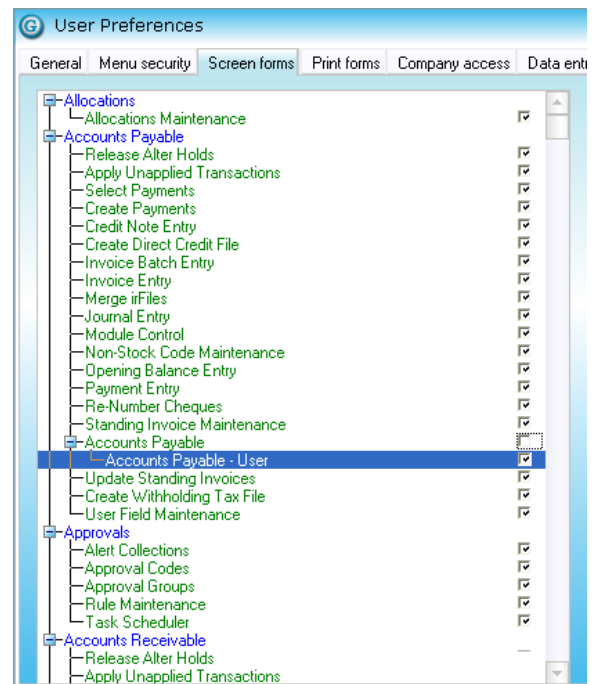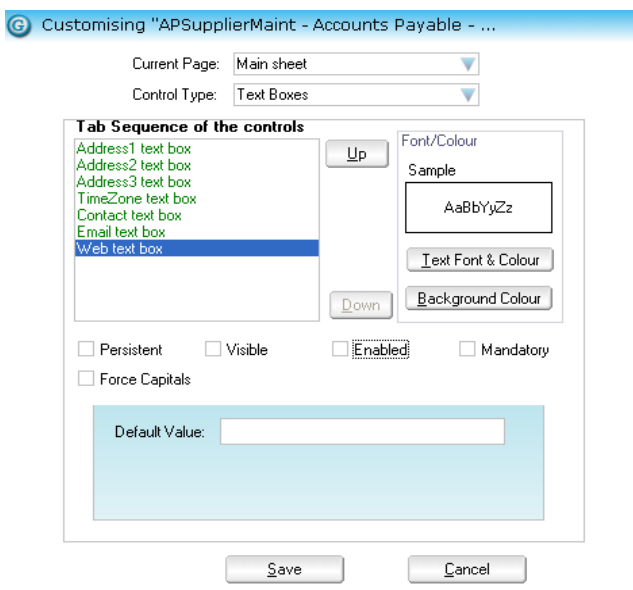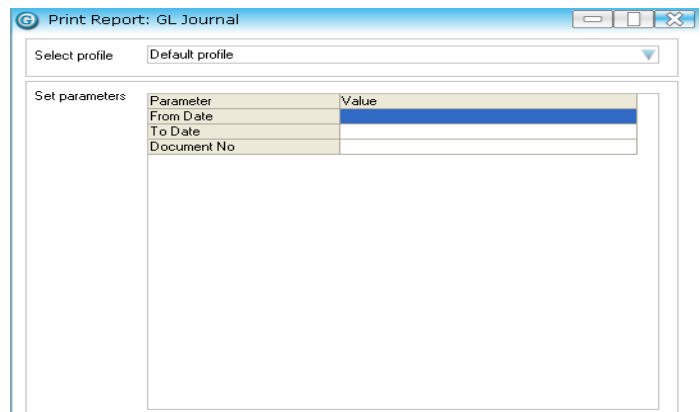
General Ledger Journal Report

-James Terrington

If you have ever…

- Had your accountants asking for a listing of all General Ledger journals for a date range: or
- Needed the ability to run such a report yourself.

Then contact the JR.Bizlink help desk as we have a customised report that could be appropriate.

Integration to Microsoft Project

-James Terrington

Having working in Construction and Project Management businesses I have heard many times of the requirement try and integrate Project Management tools with Financial software.

There are many potential options for this type of integration:

- Catering for a Work breakdown structure (WBS) in the Financial software
- Being able to link the WBS into the Cost Code structure within the Financial software
- Allowing information to be shared between Project Management tools and the Financial software

Greentree are currently in a Beta release for a new sub-module that allows for specific integration between Greentree and Microsoft Project.

Initially this will focus on providing 3 wizards to exchange information between the two programs:

Employee Wizard

- Greentree Job Cost employees will be pushed into Microsoft Project as Resources.

Estimate Wizard

- Microsoft Project tasks will be pulled into Greentree as Job Estimates

Task Wizard

- Greentree Service Requests will be pushed into Microsoft Project as tasks and updates tasks with the actual times from the Greentree Service Request.
- Microsoft Project tasks will be pulled into Greentree as Service Requests.

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