

VERSION 1.0
AUGUST 16, 2018

Apps for Greentree

CREATE CREDIT NOTES FROM PACKING SLIPS

APP NUMBER: 010052

Powered by:

MYOB Greentree

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FEATURES

1. Allow Sales staff access to create a credit note for something they've sold without allowing them full access to credit notes.
 - Create a credit note from a packing slip
 - Print the credit note

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

CREATE AR CREDIT NOTE

An **AR credit note** can be created by recalling an invoiced packing slip.

1. Select the menu item | **Data Entry | Sales Order | Packing Slip Maintenance** | (or alternatively from Sales Order enquiry and drill into an invoiced Packing Slip).

Packing Slip Maintenance

Packing Slip Detail: Number 500249.01, Branch Auckland, Date Created 28/02/2013, Date Printed 28/02/2013, Status Invoiced.

Customer Detail: Code 1002, Alpha WILLER, Name Willers Primary, Currency New Zealand, Rate 1.00000000, Fixed, Payment Terms 30 Days from Invoice Date, Salesperson Sally Scoresby (SSC).

Summary: Discount 0.00, Surcharge 0.00, Net 34,298.10, Tax 5,144.72, Total 39,442.82.

| No. | Type | Tax | Account/Code | Transaction Typ | Description | Location | UOM | Price Book | Qty Supplied | Price H |
|-----|------|-----|------------------|-----------------|-------------------------|----------|-----|------------|--------------|----------|
| 1 | IN | I | 01INTELD845EBG2 | Issue | Intel Dual Core Desktop | 03.Z01 | EA | TRADE | 72.0000 | 69.2200 |
| 2 | IN | I | 01MSI845MAX2 | Issue | MSI Dual Core Desktop | 02 | EA | TRADE | 8.0000 | 408.2500 |
| 3 | IN | I | 00ADPEN17MONITOR | Issue | ADpen 17" LCD Monito | 01 | EA | TRADE | 58.0000 | 537.8100 |

Read Only: This Packing Slip is Invoiced

Packing Slip 27 of 112

2. Click on the **Create credit note** button

AR Credit Note Creation

Credit Detail: Number CN500249.01, Date 15/07/2013, Order no., Tran type AR Credit.

Customer Detail: Code 1002, Alpha WILLER, Name Willers Primary, Currency NZD, Rate 1.00000000.

Apply Detail: Number 500249.01, Date 28/02/2013, Credit total 39,442.80.

| Type | Company/Trans | Account/Code/Job | Quantity | Price | Tax Code | Tax | Amount | Selection | Narration |
|------|---------------|------------------|----------|----------|----------|---------|----------|-------------------------------------|---------------|
| IN | AR Credit | 01INTELD845EBG2 | 72.0000 | 69.2200 | NZ GST | 650.07 | 4983.84 | <input checked="" type="checkbox"/> | |
| IN | AR Credit | 01MSI845MAX2 | 8.0000 | 408.2500 | NZ GST | 426.00 | 3266.00 | <input checked="" type="checkbox"/> | |
| IN | AR Credit | 00ADPEN17MONITOR | 58.0000 | 537.8100 | NZ GST | 4068.65 | 31192.98 | <input checked="" type="checkbox"/> | |
| GL | 06 | 10.99.9999 | 0.0000 | 0.0000 | EXE NZ | 0.00 | -0.02 | <input checked="" type="checkbox"/> | Rounding line |

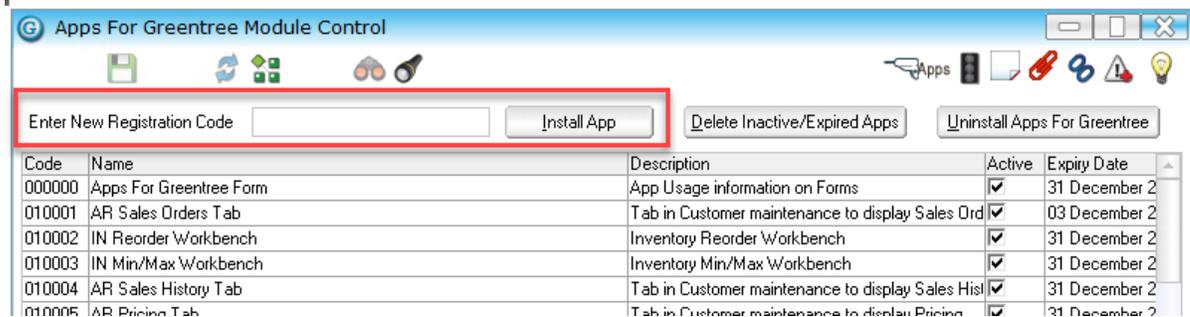
3. The **AR Credit Note** creation screen is displayed with all the items from the packing slip
4. Select the items to be credited or Deselect the items that are not to be credited.
5. Click on the Printer icon to print the Credit Note or Save.

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 Create Credit Notes from Packing Slips App.
5. Click on the Edit Users button and select the users who will be configured to use Create Credit Notes from Packing Slips, for which companies.
6. Save and Close the form.