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).

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

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- 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

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010004	AR Sales History T	ab			Tab in	Customer maintenance to display Sales	Hisl 🔽	31 December 2
010005	AR Pricing Tab				T ab in	Customer maintenance to display Pricing		31 December 2

- 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.