

VERSION 1.0

MAY 3, 2018

Apps for Greentree

INVOICE PREVIEW

APP NUMBER: 010055

Powered by:

MYOB Greentree

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FEATURES

1. Invoice Preview

This App will allow you to check the contents of invoices before printing them.

Invoice Preview is available for AR invoices, AR credit notes, JC invoices, PO Purchase orders. A simple click and you can view the invoice before emailing or printing.

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: Accounts Receivable, Accounts Payable, Purchasing

Associated Apps: None

USER INSTRUCTIONS

INVOICE PREVIEW

You are able to preview AR invoices, AR credit notes, JC invoices and PO purchase orders. The instructions on how to preview are the same for all once the data entry has been completed.

The screenshot shows the 'AR Invoice Entry' window with the following details:

- Batch:** \$1107
- Branch:** 01 (Ruckland)
- Last invoice number:** 01-500311.01
- Invoice Detail:** Number 01-500311.01, Date 30 / 08 / 2013, Order number 456789, Entered by SUPER.
- Customer Detail:** Code 1001, Name Highstone High 1, Terms 30 Days from Invoice Date, Currency NZD, Rate 1.00000000, Salesperson Sally Scoreby (536).
- Payment date:** 29 / 09 / 2013, Posting date 30 / 08 / 2013, Period end 31 / 08 / 2013.
- Summary:** Discount 0.00, Net 125.44, Tax 29.31, Total 155.75.
- Line Items Table:**

Type	Tax Type	Account/Code/Job	Description	Subcode/Location/Activity	Quantity	Price	Discount%	Discount/Tax Code	Tax%	Tax	Amount/Narration	Start Dat	Enc
Inv		17MONITOR	AOpen 17" LCD Monit	01	1.0000	50.0000	0.00	0.00/NZ GST	15.00	6.52	50.00		
Inv		FREIGHT	Freight Stock Item	02	1.0000	5.7500	0.00	0.00/NZ GST	15.00	0.75	5.75 A002 -		
Cal		10.10.1020	Servise Income		1.0000	100.0000	0.00	0.00/NZ GST	15.00	13.94	100.00 A002 -		

Click on the Preview button to check the way the invoice will look when printed.

The invoice is opened in a GT Preview window.

GT Preview Page number 1

TAX INVOICE 2 Page 1

**** COPY ONLY ****

e-Computers - NZ
 456 Main Road
 Albany Auckland 1311

Reference : 01.500311.01
 Date : 30/08/2013
 Customer : 1001
 Batch No : 1107
 Tax No. : 21212121
 Packing Slip : 01.500311.01

Phone: (00) 000 0000

Highstone High 1
 2 Davies Road 1
 Post Add2
 Post Add3
 Netherton Waikato 2951

Highstone High
 2 Davies Road
 Addington Christchurch 8024

Code	Description	Quantity	Price	Discount %	Tax %	Line Total
17MONITOR		1.0000	43.48	0.00	15.00	43.48
	AOpen 17" LCD Monitor					
	FREIGHT	1.0000	5.00	0.00	15.00	5.00
	Freight Stock Item					
A002 -		1.0000	88.98		15.00	88.98
	10.10.1020					
	Service Income					
A002 -						
	Picked by Angela Reilly					
	Packed by Angela Reilly					
	Couriered by FedEx					
	Ticket No A002					
	Despatched 30/8/2013					
	No of Boxes 0					

You can close the preview and still make changes to your invoice if required – you will need to recall the invoice. Preview can be clicked as many times as required.

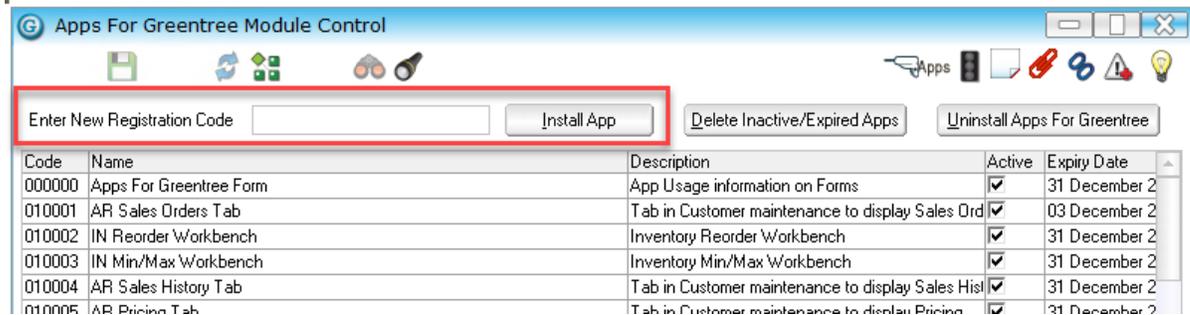
It can also be used for old existing invoices.

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 **Invoice Preview** App.
5. Click on the **Edit Users** button and select the users who will be configured to use Invoice Preview, for which companies.
6. **Save** and **Close** the form.