VERSION 1.0 MAY 3, 2018

# Apps for Greentree

# **INVOICE PREVIEW**

APP NUMBER: 010055

Powered by:

MYOB Greentree

#### **TABLE OF CONTENTS**

Features	2
Important Notes	2
Other Requirements	2
User Instructions	3
Invoice Preview	3
Implementation Guide	5
App Installation	5

## **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.

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Batch S1187		anch 💿	1 (Auchiand)		×.	Last in	oice number	81.500311.01					•	
Invoice	Line Item	Dell	very Details	Email	Dacker	Special Terms	10	10 Ca	ntom					Return Authority Respo
Invoice Detail			Customer I	letal									_	Create Call
Number	01.500211.01	Q	Code	1001		Alpi	a HIGHST							Ever Formul Involice
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Payment date	29/09/2013 🛗	Prog	an in	0,	Posting data 30	/ 06 / 2013	Period a	md 31/08/3	1013					
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38 3	PREIGHT	freight	Stock Hem	02		1.0000	5.7500	0.00	0.00 NZ	GST	15.00	0.75	5.75 A002 -	
64														

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

The invoice is opened in a GT Preview window.

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	456 Main Road Albany Auckland 1311			Date : Customer : Batch No : Tax No. :	30/08/2013 1001 1107 21212121		
	Phone: (00) 000 0000			Packing Slip :	01.500311.01		
	Highstone High 1 2 Davies Road 1 Post Add2 Post Add3 Netherton Waikato 2951			Highstone Hig 2 Davies Roac Addington Ch	gh 1 ristchurch 8024	1	
	Code Description	Quantity	Price	Discount %	Tax %	Line Total	
	17MONITOR	1.0000	43.48	0.00	15.00	43.48	
	AOpen 17 <sup>th</sup> LCD Monitor FREIGHT Freight Stock Item	1.0000	5.00	0.00	15.00	5.00	
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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

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Enter New Registration CodeInstall App Delete Inactive/Expired Apps Uninstall Apps For Greentree									s For Greentree
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010004	AR Sales History Ta	Ь			Tab in	Customer maintenance to display Sal	les Hisl	<b>I</b>	31 December 2
010005	AR Pricing Tab				T ah in	Customer maintenance to display Priv	nina		31 December 2

- 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.