VERSION 1.0 AUGUST 16, 2018

Apps for Greentree

COMBINED BILLING

APP NUMBER: 010088

Powered by:

MYOB Greentree

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FEATURES

1. Allow invoices for Child customers to be grouped against their Parent customer.

This is the usual situation for combined billing.

2. Allow an individual customer's invoices to be grouped to a single reference.

Any individual customer may want to have a single line invoice rather than receiving individual invoices.

Note that there is no requirement for all customers to be processed in the same way.

Non-combined billing customers can coexist without any issue.

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.
- There are no Combined Billing reports deployed as part of this App and it is expected that specific invoice and statement reports will be custom enhancements., and that existing reports would need a filter added to differentiate between standard and combined billing invoices.

OTHER REQUIREMENTS

Greentree Modules: Accounts Receivable

Associated Apps: None.

USER INSTRUCTIONS

CUSTOMER MAINTENANCE

From the menu option Data Entry | Accounts Receivable | Customer Maintenance, a new tab has been added to Customers for selection and display of Combined Billing.

Combined Billing is a checkbox. If ticked, then the customer and its child customer's invoices will be included on the Combined Billing Workbench.

The search has date range filter and search by Reference.

The Combined Billing Reference is the reference number assigned to the group of invoices selected to be combined in the process described below.

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31 January 2017 31 January 2017 AB Invoice 414 7 1001 Highstone High
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10 April 2017 10 April 2017 AR Invoice 447 8 1005 Wagin Secondary
06 April 2017 06 April 2017 AR Credit Note CN01.500312.01 8 1001 Highstone High Create sales o
Create standing

Note that the child customer will NOT have the Combined billing flag set, but will display the Combined Billing data associated with their parent:

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Code 1001	Alpha HIGHST	Name	Highstone High		۹			
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17 December 2014	17 December 2014	AR Invoice	01.500313.01	7 1	001	Highstone Hig	h	
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12 February 2016	12 February 2016	AR Invoice	362	7 1	001	Highstone Hig	h	Create credit note
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06 April 2017	06 April 2017	AR Credit Note	CN01.500312.01	8 1	001	Highstone Hig	h	Create sales <u>o</u> rder
								Create standing order
						1		

COMBINED BILLING PROCESSING

- 1. Select the menu option Process | Accounts Receivable | Combined Billing
- 2. Select customer(s) to search for using either their customer code(s) or their customer alpha(s).
- 3. Select the date range to search for

This will select all invoices not already included into a Combined Billing invoice.

Invoices are listed grouped by parent customer, with child accounts underneath.

(For situations where no parent-child relationship, a customer's invoices would simply be listed as a separate set).

The Combined Billing parent/individual customer is shown in bold.

rch Criteria					Process			
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From Date	01/05/201	5 👩 To Date	21 / 05.	/ 2017 📷			Process	
_								
	<u>Elear</u> <u>A</u> dvance	d <u>S</u> elect All	Deselect All	Search Now				
Customer Code	Customer Name	Job/Parent Code	Job/Parent Name	Reference	Excl Transaction	Transaction GST	Incl Transaction	Select
1005	Wagin Secondary							
				377	100.00	15.00	115.00	
				396	234.00	35.10	269.10	
				CN500181.01	-2,875.00	-431.25	-3,306.25	
				IN500004	234.00	35.10	269.10	
1001	Highstone High	1005	Wagin Secondary					
				454	0.43	0.07	0.50	
				80	-86.96	-13.04	-100.00	
				CN01.500311.0	-135.44	-20.31	-155.75	
				CN01.500313.0	-33.48	-5.02	-38.50	
				CN500281.01	-1,000.00	-150.00	-1,150.00	
				CN500540.01	-10.00	-1.50	-11.50	
				CN500541.01	-622.87	-93.43	-716.30	
				CN500596.01	-525.00	-78.75	-603.75	
				CNRKtestingAcr	0.25	0.15	0.40	
				IN500002	112.00	16.80	128.80	
				IN500003	1,590.00	238.50	1,828.50	
1006ANEW	Pretty Valley High	1005	Wagin Secondary					
TEST	Test Customer							
				388	132.00	19.80	151.80	
				CN388	-119.25	-17.55	-136.80	
1011	Highett Primary	TEST	Test Customer					

4. Select invoices to be combined:

Combined Bil	ling Workbench						-	
earch Criteria • From Custome • From Custome From Date	r Code r Alpha 01 / 05 / 201 Clear Advance	To Custo To Custo 5 5 To Date	mer Code mer Alpha 21 / 05	₹ 1 2017 <mark>©</mark> Search Now	Process Invoice Posting	g Date 31 es	/ 05 / 2015 📷	
Customer Code	Customer Name	Job/Parent Code	Job/Parent Name	Reference	Excl Transaction	Transaction GST	Incl Transaction	Select
1005	Wagin Secondary							
				377	100.00	15.00	115.00	•
				396	234.00	35.10	269.10	
				CN500181.01	-2,875.00	-431.25	-3,306.25	
				IN500004	234.00	35.10	269.10	
1001	Highstone High	1005	Wagin Secondary					
				454	0.43	0.07	0.50	
				80	-86.96	-13.04	-100.00	
				CN01.500311.0	-135.44	-20.31	-155.75	Г
				CN01.500313.0	-33.48	-5.02	-38.50	
				CN500281.01	-1,000.00	-150.00	-1,150.00	
				CN500540.01	-10.00	-1.50	-11.50	
				CN500541.01	-622.87	-93.43	-716.30	Г
				CN500596.01	-525.00	-78.75	-603.75	Г
				CNRKtestingAcr	0.25	0.15	0.40	Г
				IN500002	112.00	16.80	128.80	~
				IN500003	1,590.00	238.50	1,828.50	
1006ANEW	Pretty Valley High	1005	Wagin Secondary					
TEST	Test Customer							
				388	132.00	19.80	151.80	
				CN388	-119.25	-17.55	-136.80	
1011	Highett Primary	TEST	Test Customer					

- 5. Enter the Invoice Posting Date and whether to print invoices in the top right-hand panel and click Process.
- 6. A pop-up confirms completion of the process.

G Comp	lete]
Combined B	illing (9) Crea	ated for 100	5 - Wagin Sec	ondary	Close	
Customer M Code 1005 Pts/Rebates P Main Defaults	aintenance	S Child Balance Delivery Trans	Wagin Secondary Displayed curr es Master Comil sactions Custom e	ency ○ Foreign ④ bined Billing Label Printir Xchange WebView S	Local Ing eDocs Notes ales Orders Sales Hi	s Related Analysis story Pricing Freight
Combined Billing	015 🔜 🚛 267.00	2/2017 🗖 Befere	2009	2		Search Now
From 1370372						
Posting Date	Docuemnt Date	Fransaction Type	Heterence	Combined Billing Referen	Lustomer	Lustomer Name
23 May 2015	25 May 2015	Ari Journal	3	0	1001	Highstone High
20 May 2015	20 May 2015	An invoice	334	D C	1001	Highstone High
13 May 2015	15 May 2015	ARI INVOICE	000338.01	0	1001	
21 May 2015	21 May 2015	An invoice	I E SYRINGUT	7	1001	Highstone High
22 June 2015	22 June 2015	AR Invoice	355	/	1001	Highstone High
22 September 2015	22 September 2015	AH Invoice	358	/	1001	Highstone High
12 February 2016	12 February 2016	AR Invoice	362	7	1001	Highstone High
04 April 2016	04 April 2016	AR Invoice	378	7	1001	Highstone High
17 May 2016	17 May 2016	AR Invoice	381	7	1001	Highstone High
24 June 2016	24 June 2016	AR Invoice	389	7	1001	Highstone High
31 January 2017	31 January 2017	AR Invoice	414	7	1001	Highstone High
03 June 2015	03 June 2015	AR Invoice	500713.01	7	1001	Highstone High
10 April 2017	10 April 2017	AR Invoice	447	8	1005	Wagin Secondary
06 April 2017	06 April 2017	AR Credit Note	CN01.500312.01	8	1001	Highstone High
04 April 2016	04 April 2016	AR Invoice	377	9	1005	Wagin Secondary
12 October 2015	12 October 2015	AR Invoice	IN500002	9	1001	Highstone High

AR INVOICE/STATEMENT PRINTING

Existing AR Invoice and Statement reports are generally recommended to be set up to filter out invoices that are for combined billing customers, and new report formats created specifically for combined billing Invoices. Refer to your Greentree consultant for assistance with the new reports

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 Ne	ew Registration Co	de		Install App		Delete Inactive/Expired Apps	<u>U</u> nins	tall Apps	For Greentree
Code	Name				Descr	iption		Active	Expiry Date 🛛 🔺
000000	Apps For Greentre	e Form			App U	sage information on Forms		▼	31 December 2
010001	AR Sales Orders 1	Гаb			Tab in	Customer maintenance to display Sale	s Ord	v	03 December 2
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010005	AR Pricing Tab				T ah in	Customer maintenance to displau Pricis	na		21 December 2

- 4. Select/Highlight the Combined Billing App.
- 5. Click on the Edit Users button and select the users who will be configured to use Combined Billing, for which companies.
- 6. Save and Close the form.

OTHER GREENTREE CONFIGURATION

Complete the following set-up in Greentree before configuring the App.

Set Combined Billing on parent customers, or individual customers as required.

APP CONFIGURATION

- 1. Select the menu item | System | Apps For Greentree | Apps Module Control |
- 2. Select/Highlight the Combined Billing App.
- 3. Click on the Change button

GT Cor	nbined Billin	g Control	_ 🗆 X
	0 22	- Hafg 🕞	▣₯₽₫♡
Combined Billing			
First Reference	100000	Last Reference	999999
Next Reference	100000		
Billing Report		~ .	Display expanded
Exclude Credit	Notes		

First/Next/

Last Reference	For autonumbering of the combined billing reference numbers.
Billing Report	The Invoice report format designed to display combined invoices.
Display Expanded	When selected the Combined Billing history display includes all the individual transactions. Without it, these are summed into a single line. Highly recommended.
Exclude Credit Notes	This can be used to prevent inclusion of credit notes, if required.