VERSION 1.0 DECEMBER 10, 2019

Apps for Greentree

AR INVOICE UPDATE ORDER NUMBER

APP NUMBER: 010110

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	2
Important Notes	2
Other Requirements	2
User Instructions	3
AR Invoice Maintenance	3
Implementation Guide	5
App Installation	5
OTHER GREENTREE CONFIGURATION	Error! Bookmark not defined.
APP CONFIGURATION	Error! Bookmark not defined.

FEATURES

1. Update Order Number

This App allows Update of the Customer Order number on Read only AR invoices - this is useful where the customer has placed an order then says they will come back to you with the order number, but the invoice has been updated before that happens.

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

Associated Apps: None

USER INSTRUCTIONS

AR INVOICE MAINTENANCE

| Data Entry | Accounts Receivable | Invoice Entry

Once an invoice becomes Read Only it is normally unable to be altered. This App allows the Order Number reference to be changed, but only if the invoice hasn't already been applied.

1. Bring up the invoice you want to change the order number on.

бт				AR Invoice Entry				_ o >
00	i C X 🖨	# @ ← ← -	$\rightarrow \rightarrow \in \Sigma$				₪ GL	🤜 afg 🕞 🗊 🤣 🖉 🕂 🤅
Batch S4813	Branch	01 (Auckland)	\sim	Last invoice number	1082			
Invoice	Line Item	Delivery Details	Email Tracker	Special Terms	Custom			Credit Request
Invoice Detail		Customer Detai	il					Create Call
Number	1082	Code	1000 🔍	Alpha KANGAN	Q			Free Format Invoice
Date	10 / 10 / 2019 🗮	Name	Kangan Education Unit		\odot			Update Order Number
Hold code	None ~	Terms	30 Days from Invoice Date	Q				Update Narration
Order number		Currency	NZD Rate 1.000000	000 Printed?				Create credit note
Entered by	SUPER	Salesperson	Sally Scoresby (SSc)	Custo <u>m</u>	er status			Create receipt
Payment date	09 / 11 / 2019 🖽		Posting date 10 / 1	10 / 2019 🗮 Period e	nd 31 / 10 / 2019 🗮			
Narration					<u>^</u>			
					~			
Discount 0.0	0 Net	127.26	Tax 19.09	Total 14	16.35			
Гуре Тах Туре	Company/Trans Account/	Code/Job Description	1	Transaction Analysis Sul	ocode/Lo Quantity	Price Tax Code	Tax An	nount Narration
N I	Issue 100108	Wireless Mo	ouse	02	2.0000	34.8500 NZ GST	9.09	69.70
SL E	06 10.99.999	9 Suspense G	T ONLY	02	0.0000	0.0000 EXE-NZ	0.00	-0.01 Rounding line
Read Only: Th	is invoice is in a closed p	eriod		h	avoice 105 of 3583			

2. Click Update Order Number button and enter the Order Number into the pop-up.

GT	ι	lpdate Order Number	_						
	0 %	67 @	🗎 GL 🖘 afg 🕂 🥐						
Order number	13543								
Editing an existing ARInvoice									

3. Click Save.

GT							AR Invoid	e Entry					_ 🗆 X
	7 🗆	1 C K	÷ 68	$\emptyset \vdash \leftarrow$	$\rightarrow \rightarrow \in$	×						GL 🖘 AFI	: € 🗊 🖉 & ∆ ?
Batc	54813		Branch 01 (Auckland)		\sim	Last invoice	number 108	2				
	Invoice	Line Iter	m (Delivery Details		Email Tracker	Specia	I Terms	Custom				Credit Request
Inve	ice Detail		(Customer Deta	ail								Create Call
Nu	nber	1082	Q	Code	1000	Q	Alpha	KANGAN	Q				Free Format Invoice
Dat	e	10 / 10 / 2019 [0-0 ##	Name	Kangan Ed	ucation Unit			Q				Update Order Number
	d ee de	Neme	_	Terms	30 Days fro	m Invoice Date	Q						Update Narration
Ore	ler number	13543		Currency	NZD	Rate 1.00000	000 🗹	Printed?					Create credit note
LIII	ered by	SUPER		Salesperson	Sally Scores	by (SSc)	Q	Custo <u>m</u> er sta	itus				Create receipt
Pay	ment date	09 / 11 / 2019			Pos	ting date 10 /	10 / 2019 🟥	Period end 3	1 / 10 / 2019 🗮				
Nar	ration								<u>~</u>				
									v				
Disc	ount 0.0	0	Net 12	27.26	Tax	19.09	То	otal 146.35					
Туре	Tax Type	Company/Trans	Account/Code/	Job Description	n		Transaction Ana	alysis Subcode	/Lo Quantity	Price Tax Code	Tax	Amount	Narration
IN	1	Issue	100108	Wireless M	louse			02	2.0000	34.8500 NZ GST	9.09	69.70	
IN	I	Issue	100103	Laptop Car	rry Case			02	1.0000	76.6600 NZ GST	10.00	76.66	
GL	E	06	10.99.9999	Suspense (GT ONLY				0.0000	0.0000 EXE-NZ	0.00	-0.01	Rounding line

- 4. The order number has been updated.
- 5. This process can be repeated if necessary.

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

	G Apps For Greentree Module Control										
Enter New Registration Code			İnstal		0	Delete Inactive	/Expired Apps	Ur			
ľ		Filter Apps									
	Code	Name	Description	Acti	ive	Expiry Date	User Count	Settings	App Count		
l	010025	SO Freight	Functionality to add Freight rule to Sales Orde	ers 💌		01 November 2017	100-Edit User	Change	J		
	010026	Points	Points Module to add Points for Customer Sa	les 🔽		31 December 2049	100-Edit User	Change)		
	010027	SO Generate Invoice Au	Functionality to allow email of invoices from S	60 Ge 🔽		31 December 2049	100-Edit User	Change)		
	010029	SO Despatch	Advanced despatch functionality from packir	ng slip 🔽		31 December 2050	0-Edit Users	Change	i i		
	010030	AR Credits from CRM Re	Functionality to allow the generation of AR or	edit n 🔽		31 December 2099	24-Edit Users	Change	1		

- 4. Select/Highlight the AR Invoice Update Order Number App.
- 5. Click on the Edit Users button and select the users who will be configured to use the AR Invoice Update Order Number App, for which companies.
- 6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.
- 7. Save and Close the form.

OTHER GREENTREE CONFIGURATION

Not required for this App.

APP CONFIGURATION

Not required for this App.