

VERSION 1.0  
OCTOBER 2, 2017

# Apps for Greentree

## BRANCH CHECKING

APP NUMBER: 010127

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. AR Credit Note Branch Check

This app checks the branch on an AR Credit Note and compares it to the customers branch. If they are different it will either prompt you or automatically change the branch depending on the App Control.

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### 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.

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### OTHER REQUIREMENTS

**Greentree Modules:** Accounts Receivable

**Associated Apps:** None

# USER INSTRUCTIONS

## AR CREDIT NOTE ENTRY

On Saving of an AR Credit Note this app compares the branch on the customer with the branch on the credit note and will prompt or change the branch depending on the App module control.

The screenshot displays the 'AR Credit Note Entry' application interface. The main window shows customer details for 'Kangan Education Unit' with a default branch of '03 (Christchurch)'. A secondary window, 'AR Credit Note Entry', shows a credit note for the same customer but with a branch of '01 (Auckland)'. A 'Confirmation' dialog box is overlaid on the screen, asking: 'This Customer has a default branch of 03 (Christchurch). Do you want to use branch 03 (Christchurch) for this Credit Note?'. The dialog has 'Yes' and 'No' buttons.

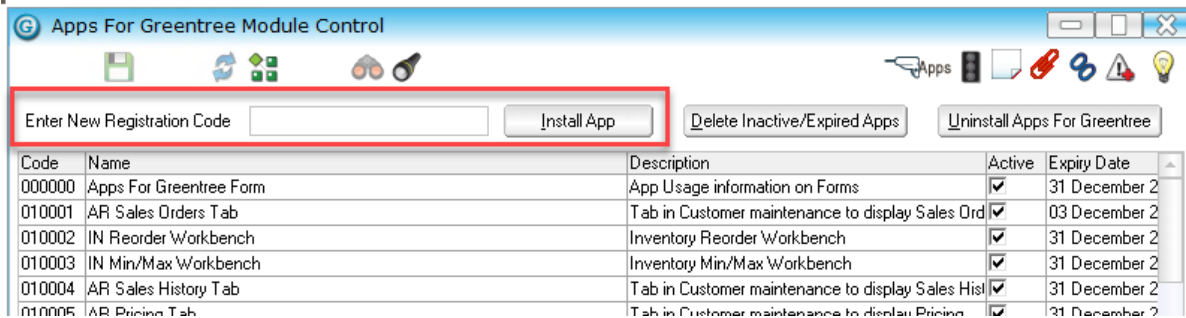
Type	Tax Type	Account/Code/Job	Description	Subcode/Location/Activity	Quantity	Price	Tax Code	Tax	Amount	Narrat
IN	I	00AOPEN17MONIT	AOpen 17" LCD Monito	01	1.0000	9163.6600	NZ GST	1195.26	9163.66	
IN					0.0000	0.0000	NZ GST	0.00	0.00	

## IMPLEMENTATION GUIDE

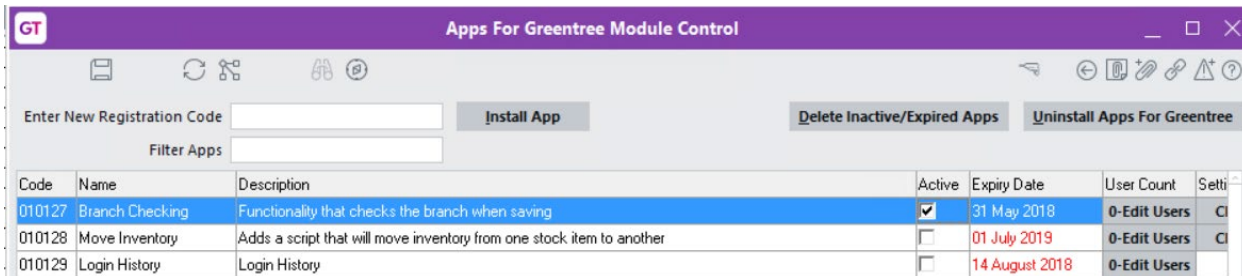
Please refer to the Important Notes section above before installing and configuring this App

### APP INSTALLATION

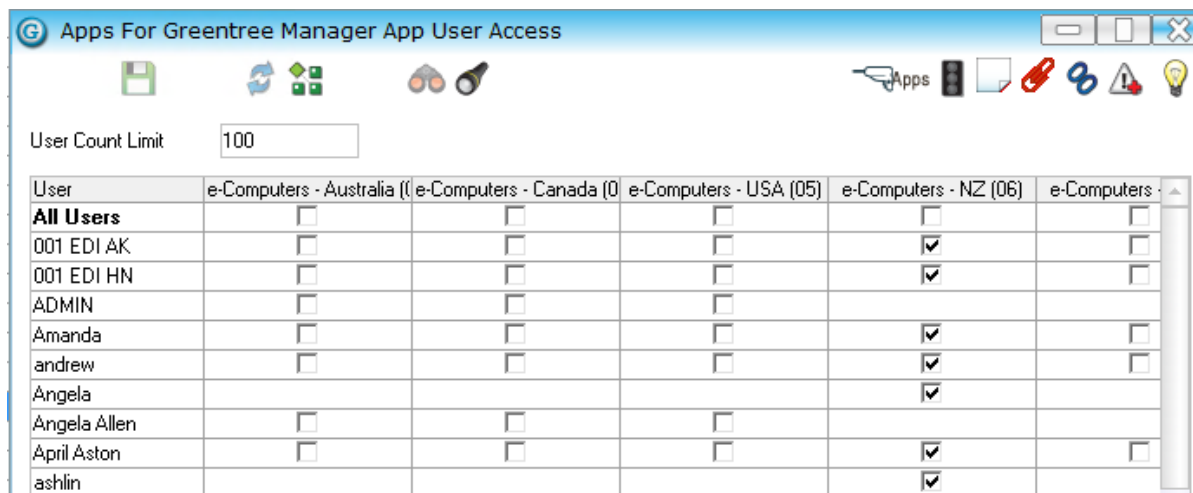
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Branch Checking App.



5. Click on the Edit Users button and select the users who will be configured to use Branch Checking, for which companies.



- Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
- Save** and **Close** the form.

## APP CONFIGURATION

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010112	AR Statement Email Attac	Functionality to email attachments from AR Statem	✓	06 October 2016	0-Edit Users		
010113	CM Inwards Cash Script	Functionality to import Bank statement and genera	✓	03 February 2017	0-Edit Users	Change	
010114	Franchisee Payments	Functionality to pay franchisees.	✓	02 March 2017	24-Edit Users	Change	
010115	AR Invoice Email Interfac	Functionality to email Interface file with AR Invoice	✓	16 May 2018	0-Edit Users		
010116	KPI Metrics Reporting	Functionality for service request KPI reporting.	✓	14 August 2018	0-Edit Users	Change	
010117	SO Parent Credit Limit Ch	Functionality for checking credit limit for the parent	✓	17 June 2017	24-Edit Users	Change	
010118	Pack House	Customer Service and Pack House Functionality	☐	03 August 2017	24-Edit Users		
010119	WebView PD Entry	WebView PD Entry	✓	15 November 2020	0-Edit Users		
010120	Bulk Asset Usage Entry	Bulk Asset Usage Entry	✓	13 December 2017	24-Edit Users		
010121	CRM Asset Related Maint	CRM Asset Related Maintenance	✓	07 July 2022	0-Edit Users		
010122	GL Transaction Export fo	GL Transaction Export for External Systems	✓	28 December 2017	24-Edit Users	Change	
010123	Display withholding tax in	Display withholding tax in AP Invoice	✓	20 February 2018	0-Edit Users		
010124	Trust Draw Down	Trust Draw Down	✓	01 March 2018	24-Edit Users	Change	
010125	CRM Service Requests	CRM Service Requests Attachments on Communica	✓	14 March 2018	0-Edit Users		
010126	Pack Prod	Pack Prod	✓	24 March 2018	24-Edit Users	Change	
010127	Branch Checking	Functionality that checks the branch when saving	✓	31 May 2018	0-Edit Users	Change	
010128	Move Inventory	Adds a script that will move inventory from one sto	✓	01 July 2019	0-Edit Users	Change	
010129	Login History	Login History	✓	14 August 2018	0-Edit Users		
019000	eDocs Scraping AP Invo	eDocs Scraping for Supplier Invoices/Credits	✓	07 June 2018	0-Edit Users		800000-View
020001	IPM Integration	IPM Integration for Greentree	✓	31 December 2099	0-Edit Users	Change	
320001	JC Plant Hire	Functionality to manage day to day hiring out of JC	☐	31 December 2099	24-Edit Users	Change	
320011	Award Interpreter	Interpret timesheets for payroll processing.	☐	27 November 2016	24-Edit Users		

After installing the App click on the **Change** button

**Branch Checking Control Form**

Credit Note

No checking

Check Branch to be matched to Customer Branch

Force Branch to match Customers Branch

Select the level of checking you require for this company.

Check branch will display a message if the branch on the AR Credit Note is different to the customers default branch and you can then optionally change the branch

Force branch will automatically update the branch on the AR Credit Note to be the same as the customers Branch.