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.

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 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.

Customer Maintenance				- + ×
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ode 1000 🔍 Alpha KANGAN 🔍 Name	Kangan Education Unit		· •	
	Displayed currency	Foreign 💿 Local		
Pricing Freight Pts/Rebates Pts/Rebates Trans	actions Master Combined Billin	g Label Printing eDocs	Notes Related Analysis	•
Main Defaults Integration Credit Email Tracke	r Delivery Transactions Cust	tom eXchange WebView	Sales Orders Sales History	Email/Print Invoices
Branch 03 (Christchurch)	Taxation			View Credit History
Currency NZD (New Zealand Dollars)	Tax type Inc	lusive V		Poture Authority Boguest
AR Credit Note Entry	Tayloodo NZ	GST O		
Batch Branch 01 (Auckla	ind)	 Last credit note number 		ctions
Credit Note Line Item Ap	iply Details Delivery Detai	ils Custom	Email Tracker	un ant Canadà Mata
Credit detail	Customer detail			
Number 92584 🔍	Code 1000	Ripha K	angan 🔍	pice
Date 02 / 10 / 2017 🚃	Name Kangan Education	Unit	۹,	t note
Order no.	Salesperson Sally Scoresby (SS	c) 🔍		mal
Entered by	Currency NZD Rate	1.00000000	Customer status	eipt
				1 invoice
Payment date 01 / 11 / 2017 🧱 Posting date	02 / 10 / 2017 🧱 🛛 Period e	end 31 / 10 / 2017 🧱		ardar
Narration Kangan Education Unit				
G	Confirmation			
	This Customer has a def	ault branch of 03 (Christchur	ch). Do vou want to use bran	ch 03 (Christchurch) for this Cred
	•			
Responsibility Reason		Yes	No	
Discount 0.00 Net 7		25 1.0131 13.	lb3.bb	
Tupe Tay Tupe Account/Code/Job Description	Subcode/Location/Activity	Quantitu Price Tr	v Code Tay	AmountNarrat
IN I 00A0PEN17MONIT A0pen 17" LCD	Monito 01	1.0000 9163.6600 NZ	Z GST 1195.26	9163.66
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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 App	s For Greentr	ee Module C	Control					
	8	ø 🏦	<i>i</i> n <i>d</i>			Apps		🤗 🔥 🖄 💡
Enter Ne	ew Registration Co	ode		Install App		Delete Inactive/Expired Apps	<u>J</u> ninstall A	pps For Greentree
Code	Name				Descr	ption	Activ	e ExpiryDate 🔺
000000	Apps For Greentr	ee Form			App U	sage information on Forms	•	31 December 2
010001	AR Sales Orders	Tab			Tab in	Customer maintenance to display Sales	Ord 🔽	03 December 2
010002	IN Reorder Work	bench			Invent	ory Reorder Workbench	~	31 December 2
010003	IN Min/Max Worl	kbench			Invent	ory Min/Max Workbench	~	31 December 2
010004	AR Sales History	Tab			Tab in	Customer maintenance to display Sales	Hisl 🔽	31 December 2
010005	AR Pricing Tab				T ab in	Customer maintenance to display Pricin		21 December 2

4. Select/Highlight the Branch Checking App.

GT			Apps For Greentree Module C	ontrol			_ C) X
		: 48 Ø				- P		\mathbb{A}^{+} (?)
Enter N	ew Registration Code		Install App	Delete Inactive/Expired	Apps	<u>U</u> ninstall	Apps For Gree	entree
	Filter Apps							
Code	Name	Description		Active	Expiry	Date	User Count	Setti
010127	Branch Checking	Functionality that checks the brain	anch when saving	✓	31 Maj	y 2018	0-Edit Users	C
010128	Move Inventory	Adds a script that will move inve	ntory from one stock item to another		01 July	2019	0-Edit Users	CI
010129	Login History	Login History			14 Aug	gust 2018	0-Edit Users	

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

(Apps For Gre	entree Manager Ap	p User Access			
		Ø 😫	n 🔊		-ƏApps 📱 🗔 🛃	୧ ୫ 🛆 💡
	User Count Limit	100				
	User	e-Computers - Australia ((e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers 🔺
	All Users					
	001 EDI AK					
	001 EDI HN					
	ADMIN					
	Amanda					
	andrew					
	Angela					
	Angela Allen					
	April Aston					
	ashlin					

- 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.

APP CONFIGURATION

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Enter N	ew Registration Code	Install App			(<u>D</u> elete Inactive	/Expired Apps	Uninstall Apps For Greentr
	Filter Apps							
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count	
010112	AR Statenent Email Attac	Functionality to email attachments from AR Statem	V	06 October 2016	0-Edit Users			
010113	CM Inwards Cash Script	Functionality to import Bank statement and genera	V	03 February 2017	0-Edit Users	Change	J	
10114	Franchisee Payments	Functionality to pay franchisees.	V	02 March 2017	24-Edit User:	s Change	J	
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 Cł	Functionality for checking credit limit for the parent	•	17 June 2017	24-Edit User:	s Change)	
010118	Pack House	Customer Service and Pack House Functionality	Γ	03 August 2017	24-Edit User:	5		
010119	WebView PO Entry	WebView PO Entry	▼	15 November 2020	0-Edit Users	0		
010120	Bulk Asset Usage Entry	Bulk Asset Usage Entry	~	13 December 2017	24-Edit User:	5		
010121	CRM Asset Related Mair	CRM Asset Related Maintenance	V	07 July 2022	0-Edit Users)		
010122	GL Transaction Export fc	GL Transaction Export for External Systems	V	28 December 2017	24-Edit User:	s Change		
010123	Display withholding tax ir	Display withholding tax in AP Invoice	V	20 February 2018	0-Edit Users	1		
010124	Trust Draw Down	Trust Draw Down	V	01 March 2018	24-Edit User:	s Change		
010125	CRM Service Requests /	CRM Service Requests Attachments on Communi	V	14 March 2018	0-Edit Users			
010126	Pack Prod	Pack Prod	•	24 March 2018	24-Edit User	Change		
010127	Branch Checking	Functionality that checks the branch when saving	V	31 May 2018	0-Edit User	Change	î l	
010128	Move Inventory	Adds a script that will move inventory from one sto	V	01 July 2019	0-Edit Users	Change		
010129	Login History	Login History	v	14 August 2018	0-Edit Users)		
019000	eDocs Scraping AP Invo	eDocs Scraping for Supplier Invoices/Credits	•	07 June 2018	0-Edit Users	1	800000-View	
020001	IPM Integration	IPM Integration for Greentree	V	31 December 2099	0-Edit Users	Change		
320001	JC Plant Hire	Functionality to manage day to day hiring out of JC	Γ	31 December 2099	24-Edit User:	s Change	1	
320011	Award Interpreter	Interpret timesheets for payroll processing.	Γ	27 November 2016	24-Edit User:	s		

After installing the App click on the Change button

G Branch Checking Control Form	- + ×
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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.