

VERSION 1.0
MARCH 1, 2018

Apps for Greentree

DELIVERY ADDRESS

APP NUMBER: 010133

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	2
Important Notes	2
Other Requirements	2
User Instructions.....	3
JC AR Invoice - DELIVERY ADDRESS	3
Implementation Guide.....	5
App Installation.....	5

FEATURES

1. Delivery Address

This App will add a button to JC AR Invoice Entry to allow the Delivery Address that is set on the Job to automatically populate onto this Invoice. It will also add the automatic copy of the Address from Job to Invoice if the Create Sales Invoice button is used on the Job Maintenance screen.

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: Job Cost

Associated Apps: None

USER INSTRUCTIONS

JC AR INVOICE - DELIVERY ADDRESS

Creating JC AR Invoice for job

1. A **Copy Delivery Address from Job** button has been added to the **JC Job AR Invoice Entry** screen.

The screenshot shows the 'JC Job AR Invoice Entry' window. The 'Job Detail' section includes Job 0002 (DEMO Job). The 'Customer Detail' section shows Code 1000, Name Kangan Education Unit, and Currency NZD. The 'Delivery Address' field is set to 1. A red arrow points to the 'Copy Delivery Address from Job' button. The 'Invoice Detail' section includes Invoice No, Date (01/03/2018), and Hold Code (None). The 'Payment Date' is 31/03/2018 and the 'Posting Date' is 01/03/2018. The 'Invoice Amount' section shows Discount 0.00, Net 0.00, Tax 0.00, and Total 0.00. The table below shows a single line item with Tax Code NZ GST.

Tax	Code	Description	IN Code	IN Description	Quantity	Rate	Discount%	Discount	Tax Code
					0.0000	0.0000	0.00		NZ GST

2. This will copy the Job's Delivery Address information to the JC AR Invoice Delivery Details.

The screenshot shows the 'JC Job AR Invoice Entry' window with the 'Delivery Details' tab selected. The 'Address' field is populated with '1', 'Lot 45', and 'North Road'. The 'Contacts' section includes Phone, Mobile, and Fax fields.

3. Using the **Create sales invoice** button will automatically populate the delivery address with the Job's delivery address.

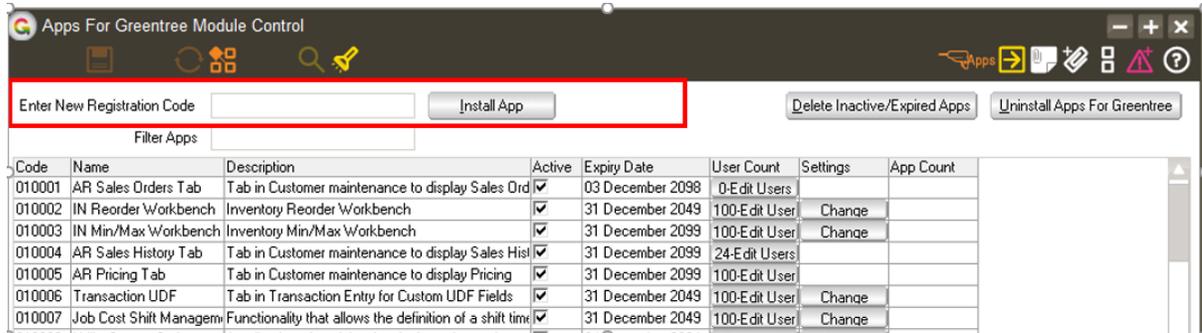
The screenshot displays the 'Job Maintenance' software interface. At the top, there is a toolbar with various icons for navigation and actions. Below the toolbar, the job details are shown: Code 0002, Name 0002 (DEMO Job), and Date 02/04/2015. The interface is divided into several sections: 'Main', 'Additional', 'Job Card', 'Transactions', 'Service Requests', 'Custom', 'Notes', 'Email Tracker', 'IPM Reconciliation', and 'Related'. The 'Job Card' section is active, showing Profit centre 0103, Warehouse 01, Branch Auckland, and Value 400.00. The 'Customer detail' section shows Code 1000, Alpha KANGAN, Name Kangan Education Unit, and Delivery address Lot 45 North Road. A tree view on the right shows the job structure, with the root node '0002 0002 (DEMO Job) - Open - 02/04/2015' selected. A red arrow points to the 'Create sales invoice' button in the right-hand panel, which is highlighted with a dashed border. Other buttons in the panel include 'Write off costs', 'Create plant charges', 'Create stock transfer', 'Create sales credit note', 'Create estimates', and 'Create timesheets'.

IMPLEMENTATION GUIDE

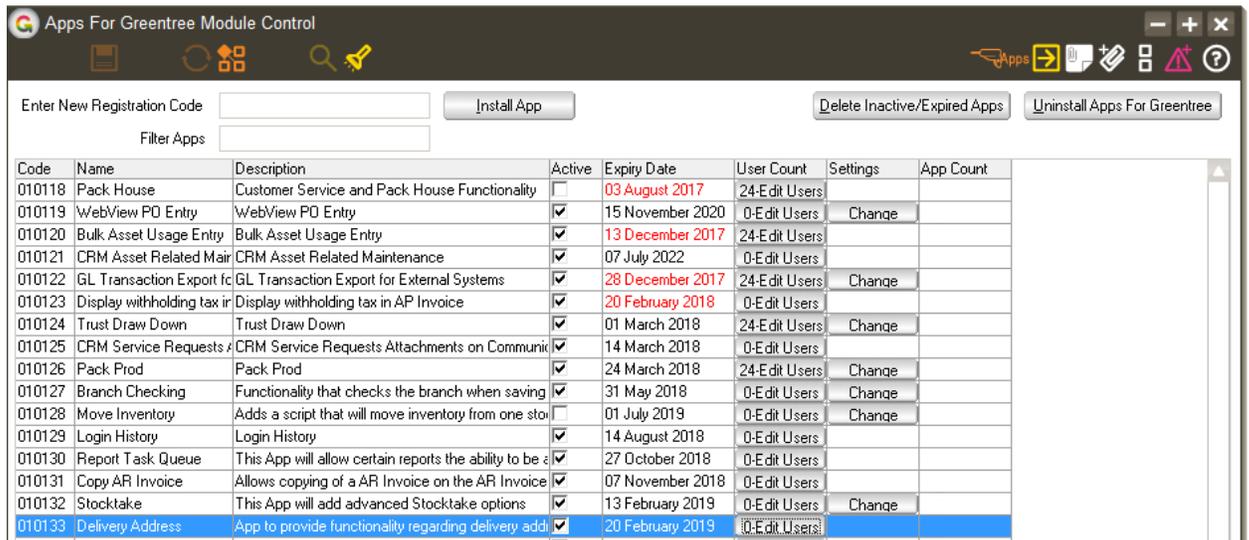
Please refer to the Important Notes section above before installing and configuring this App

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 **Delivery Address** App.



5. Click on the **Edit Users** button and select the users select the users who will be configured to use the 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.