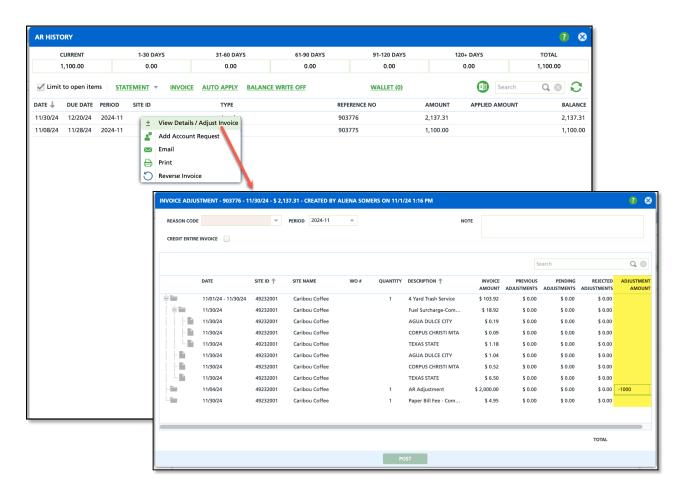# Setup - Credit Request Processing

Last Modified on 01/06/2025 2:24 pm PST

The following setup must be complete to process a credit request on an invoice.
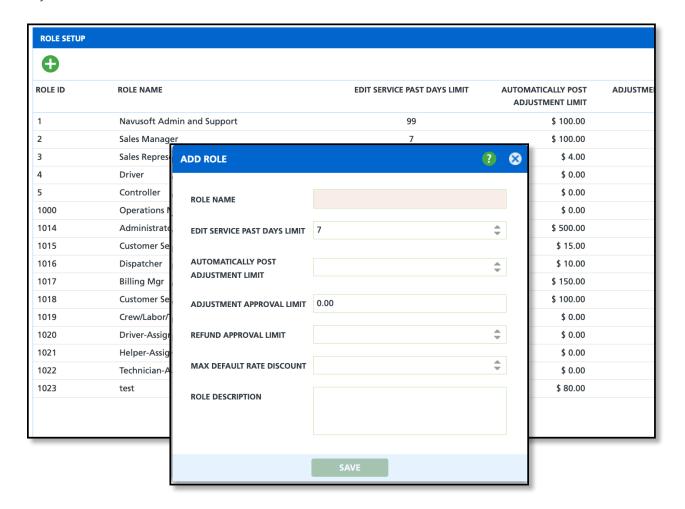

Permissions Required

Review the following permissions required for credit request processing.

Permission ID	Permission Name	Description
332	Invoice Adjustments - Pending Approval and History	Grants users permission to approve or deny pending invoice adjustments in the *Invoice Adjustment - Pending Approval and History* tool. 🔔 Only user's who's job responsibilities include approving/denying invoice adjustments should have this permission. Permission 332 is not required to create an adjustment request.
345	Apply Credit to Invoice	Grants users permission to adjust an an account's invoice.

120	Setup \ System and Security	Necessary for Role Setup, Division Setup and Reason Code Setup screens.

Role Setup

Pathway: *Setup > System > Role*

In Role Setup, review each role that permits invoice adjustments or participates in the approval process for adjusted invoices.
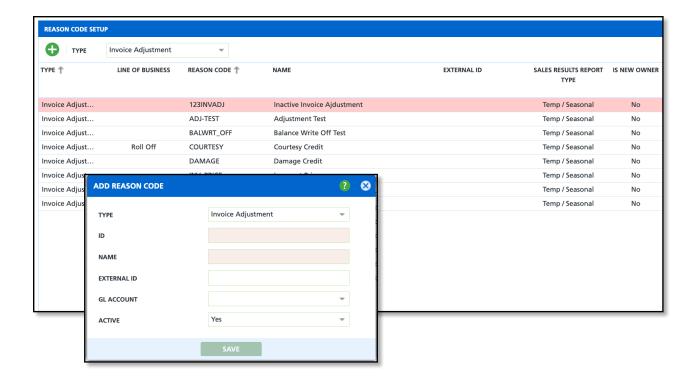
ROLE SETUP

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	AUTOMATICALLY POST ADJUSTMENT LIMIT	ADJUSTME
1	Navusoft Admin and Support	99	$ 100.00	
2	Sales Manager	7	$ 100.00	
3	Sales Repres		$ 4.00	
4	Driver		$ 0.00	
5	Controller		$ 0.00	
1000	Operations		$ 0.00	
1014	Administrato		$ 500.00	
1015	Customer Se		$ 15.00	
1016	Dispatcher		$ 10.00	
1017	Billing Mgr		$ 150.00	
1018	Customer Se		$ 100.00	
1019	Crew/Labor/		$ 0.00	
1020	Driver-Assig		$ 0.00	
1021	Helper-Assig		$ 0.00	
1022	Technician-A		$ 0.00	
1023	test		$ 80.00	

ADD ROLE

ROLE NAME

EDIT SERVICE PAST DAYS LIMIT   7

AUTOMATICALLY POST ADJUSTMENT LIMIT

ADJUSTMENT APPROVAL LIMIT   0.00

REFUND APPROVAL LIMIT

MAX DEFAULT RATE DISCOUNT

ROLE DESCRIPTION

SAVE

In Add/Update Role, the following settings are available for invoice adjustments; however, both settings may not apply to the same role based on **your** setup.

- **Automatically Post Adjustment Limit** - Sets the maximum amount a user can credit an invoice by without needing approval. If this field is empty, users will be able to credit and post any amount.
    - This setting only applies to the Invoice Adjustment screen in AR History.
- **Adjustment Approval Limit-** Sets the maximum amount a user **with Permission 332** can approve invoice adjustments up to on the Invoice Adjustment - Pending Approval and History screen.
    - This setting only applies to the Invoice Adjustment - Pending Approval and History screen in the Accounting module.

Reason Code Set Up

Pathway: *Setup > System > Reason Code*

In Reason Code Setup, create an 'Invoice Adjustment' reason code for each type of adjustment a user may qualify an adjustment under for an account.

REASON CODE SETUP						
TYPE ↑	**LINE OF BUSINESS**	**REASON CODE** ↑	**NAME**	**EXTERNAL ID**	**SALES RESULTS REPORT TYPE**	**IS NEW OWNER**
Invoice Adjust...		123INVADJ	Inactive Invoice Ajdustment		Temp / Seasonal	No
Invoice Adjust...		ADJ-TEST	Adjustment Test		Temp / Seasonal	No
Invoice Adjust...		BALWRT_OFF	Balance Write Off Test		Temp / Seasonal	No
Invoice Adjust...	Roll Off	COURTESY	Courtesy Credit		Temp / Seasonal	No
Invoice Adjust...		DAMAGE	Damage Credit		Temp / Seasonal	No
Invoice Adjus					Temp / Seasonal	No
Invoice Adjus					Temp / Seasonal	No
Invoice Adjus					Temp / Seasonal	No

ADD REASON CODE

TYPE	Invoice Adjustment
ID	
NAME	
EXTERNAL ID	
GL ACCOUNT	
ACTIVE	Yes

SAVE

1. Navigate to Setup > System > Reason Code.
2. Click **+** in the top left corner of the Reason Code Setup screen.
   ◦ This will open the Add Reason Code editor.
3. Select **Invoice Adjustment** from the Type drop down field.
4. Enter an **ID.** This displays under the Reason Code column in the Reason Code Setup screen.
5. Enter a **Name** that will display for selection when the user enters an adjustment.
6. Select a **GL Account** (if applicable) to record invoice adjustments.
7. Click **Save** when finished.

Related Articles

Adjustment History and Pending Approval
View Details / Adjust Invoice