


Set Up - Credit Request Processing

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

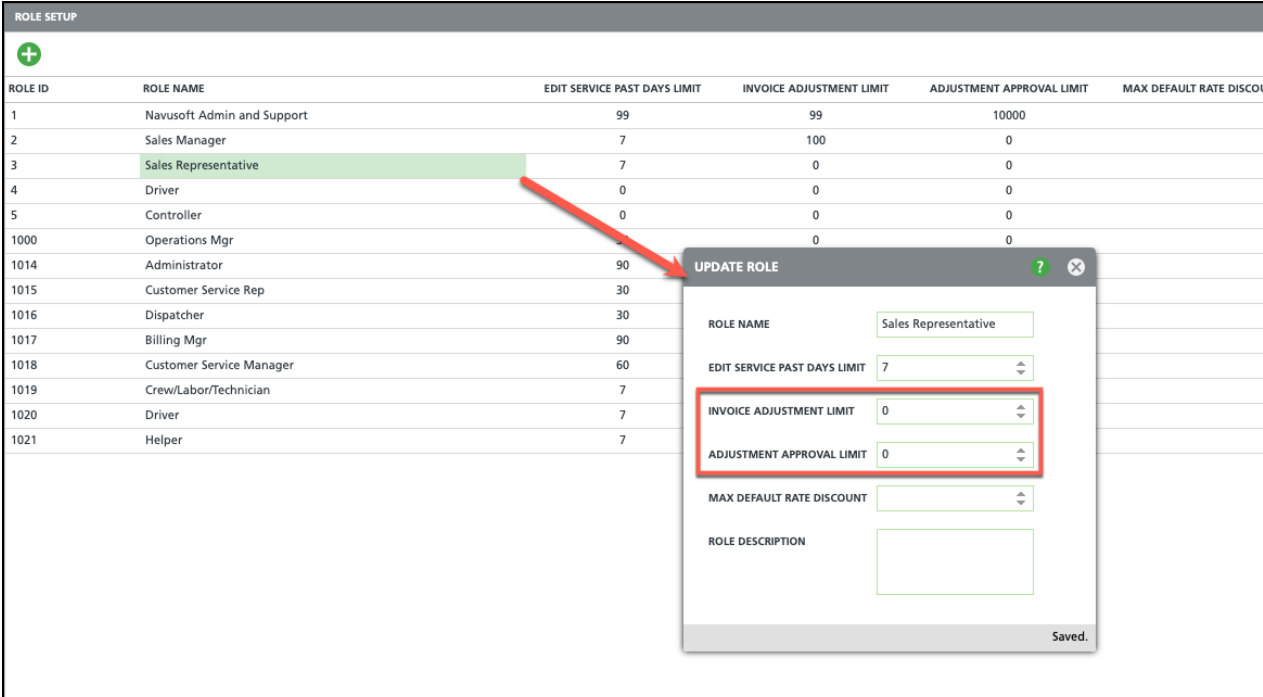
Permissions Required

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 <i>Invoice Adjustment - Pending Approval and History</i> 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.

Role Setup

Pathway: Setup > System > Role



The screenshot displays the 'ROLE SETUP' interface. A table lists various roles with their respective limits. The 'Sales Representative' role (ID 3) is highlighted in green. A red arrow points from this role to an 'UPDATE ROLE' dialog box. The dialog box shows the following fields:

- ROLE NAME: Sales Representative
- EDIT SERVICE PAST DAYS LIMIT: 7
- INVOICE ADJUSTMENT LIMIT: 0 (highlighted with a red box)
- ADJUSTMENT APPROVAL LIMIT: 0 (highlighted with a red box)
- MAX DEFAULT RATE DISCOUNT: [empty]
- ROLE DESCRIPTION: [empty]

The dialog box also includes a 'Saved.' status at the bottom right.


To setup the Role Invoice Adjustment Limit and Adjustment Approval limit:

1. Navigate to Setup > System Role
2. Double click on the Role Name to open the Update Role tool
 - Enter the **Invoice Adjustment Limit**. This is the maximum amount a user can credit an invoice by without needing approval.
 - Enter the **Adjustment Approval Limit**. This is the maximum amount a user with Permission 332 can approve in the Invoice Adjustment - Pending Approval and History tool.

Reason Code Set Up

Pathway: Setup > System > Reason Code

Invoice Adjustment type Reason Codes are required when adjusting an invoice.

REASON CODE SETUP		
	TYPE	Invoice Adjustment
TYPE ↑	REASON CODE ↑	NAME
Invoice Adjustment	COURTESY	Courtesy Credit
Invoice Adjustment	DAMAGE	Damage Credit
Invoice Adjustment	INV_PRICE	Incorrect Price
Invoice Adjustment	TAX_CREDIT	Tax Credit
Invoice Adjustment	WRITE_OFF	Write Off

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**.
6. Select a **GL Account**.
7. Select **Save** when finished.