

Accounting - Adjustment History and Pending Approval

Last Modified on 02/21/2023 10:20 am EST

The following enhancements have been added to the Pending and History tabs in the Adjustment History and Pending Approval tool.

- Pending Tab
 - Edit link added to edit the credit amount request. When Edit is selected the Invoice Adjustment screen displays. Enter a new amount in the Adjusted Amount field and select Post when finished.
- History Tab
 - The following filtering options have been added:
 - Reason Code
 - Submitted By
 - Approved By
 - Status
 - 'Submitted By' field added to capture the user who the credit request was submitted by.
 - 'Approved By' field added to capture the user who approved the request.

The screenshot displays the 'ADJUSTMENT HISTORY AND PENDING APPROVAL' interface. At the top, there is a 'DIVISION' dropdown menu set to 'All'. Below this, there are two tabs: 'Pending Approval' (with a red notification icon) and 'History'. A table lists adjustment entries with columns for DIVISION, ACCOUNT, ACCOUNT NAME, INVOICE, AMOUNT, REASON CODE, DATE, and USER. One entry for 'HOUSTON' with account '43177' and invoice '554265' is highlighted in green, with an 'Edit' button circled in red. An 'INVOICE ADJUSTMENT' modal window is open, showing details for invoice 554265 dated 07/15/22 with an amount of \$148.25. It includes a 'REASON CODE' dropdown set to 'Incorrect Price', a 'PERIOD' dropdown set to '2022-09', and a 'NOTE' field containing 'HOU- COMM ARREARS'. A table within the modal shows a breakdown of charges, including '6 Yard Trash Service' for \$119.08 and various taxes. A 'POST' button is visible at the bottom of the modal.

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