

Invoice Adjustment - Pending Approval and History - Notes Included in Excel Export (14932) [Enhancement]

Last Modified on 03/07/2023 4:18 pm EST

The Excel Export option located in the History tab of the Adjustment History and Pending Approval screen has been updated to include the export of Notes.

ADJUSTMENT HISTORY AND PENDING APPROVAL

DIVISION All

Pending Approval 3 History

PERIOD	REASON CODE	SUBMITTED BY	APPROVED BY	STATUS	LOAD	Search
Aug 2021	All	All	All	All	LOAD	 Search

ACCOUNT	ACCOUNT NAME	SITE	SITE NAME	INVOICE	AMOUNT	REASON CODE	DATE	SUBMITTED BY
33833	Example Account 1			76969	\$ 0.00	Incorrect Price	08/03/21 9:44:16 ...	Deb Lee
	Note: reversed Adjustment							
43057	Example Account 2	43057001	Example Account 2	77182	\$(28.21)	Courtesy Credit	08/03/21 10:56:4...	John Doe
	Note: Started billing before delivery. Credit from 7/15-7/21 28.21							
33833	Example Account 1							
	Note: reversed Adjustment							
33833	Example Account 1							
23212	Example Account 3							
	Note: double charged june							

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Date	Submitted By	Approved By	Note	
8/2/21 14:42	Chris Jones	Deb Lee		
8/2/21 14:43	Chris Jones	Deb Lee		
8/3/21 8:59	Chris Jones	Deb Lee		
8/3/21 8:20	Chris Jones	Deb Lee		
8/3/21 9:15	Chris Jones	Deb Lee	ARMs	
8/2/21 14:05	Chris Jones	Deb Lee	reversed Adjustment	
8/3/21 9:15	Chris Jones	Deb Lee	ARMs	
8/3/21 9:15	Chris Jones	Deb Lee	ARMs	
8/3/21 9:15	Chris Jones	Deb Lee	ARMs	
8/2/21 8:19	Chris Jones	Deb Lee	Already charged for June 2021.	
8/3/21 9:50	Chris Jones	Deb Lee		
8/4/21 12:07	Chris Jones	Deb Lee		
8/3/21 9:44	Chris Jones	Deb Lee	reversed Adjustment	
8/3/21 10:56	John Doe	Deb Lee	Started billing before delivery. Credit from 7/15-7/21 28.21	
8/3/21 9:45	Chris Jones	Deb Lee	reversed Adjustment	
8/3/21 9:49	Chris Jones	Deb Lee		
8/4/21 11:44	Sam Hunt	Deb Lee	double charged june	

Pathway: Accounting > Invoice Adjustment - Pending Approval and History