

Invoice Adjustment - Pending Approval And History - Modifications to History Screen (14762) [Enhancement]

Last Modified on 03/22/2023 9:42 am EDT

The following modifications have been applied to the History screen of the Invoice Adjustment - Pending Approval and History tool:

1. Added filters:
 - Reason Code
 - Submitted By
 - Approved By
 - Status
2. Search box added.
3. Count and Total display at bottom of screen based on the filters selected.
4. Added columns:
 - Submitted By
 - Approved By
5. Row of a rejected request will display red.

ADJUSTMENT HISTORY AND PENDING APPROVAL									
DIVISION: All									
Pending Approval 4 History									
PERIOD	REASON CODE	SUBMITTED BY		APPROVED BY		STATUS	LOAD [Search]		
Feb 2023	All	All		All		All			
ACCOUNT	ACCOUNT NAME	SITE	SITE NAME	INVOICE	AMOUNT	REASON CODE	DATE	SUBMITTED BY	APPROVED BY
43182	Example Account 1 L...			771569	\$(100.00)	Courtesy Credit	02/16/23 2:21:51 ...	Jane Smith	Alex Turner
	Note: HOU - COMM ARREARS								
33002	Example Account 2			845933	\$(50.00)	Courtesy Credit	02/20/23 1:43:12 ...	Alex Turner	Alex Turner
	Note: Test - Aliena								
43865	Example Account 3			737625	\$(25.00)	Courtesy Credit	02/21/23 12:20:1...	Jane Smith	Jane Smith
	Note: this is note								
21732	Example Account 4	21732001	Example Account 4	850218	\$(50.00)	Courtesy Credit	02/22/23 8:04:08 ...	Alex Turner	Alex Turner
	Note: Charge Error								
44437	Example Account 5			794408	\$(1.00)	Damage Credit	02/22/23 3:29:27 ...	John Doe	John Doe
26034	Example Account 6 INC			853605	\$(207.86)	Courtesy Credit	02/28/23 1:55:37 ...	Jane Smith	Jane Smith
	Note: adjust off balance								
23334	Example Account 7			853604	\$(15.50)	Courtesy Credit	03/07/23 10:33:2...	Jane Smith	Jane Smith
	Note: pushed back to 2023-02								
23334	Example Account 7			853604	\$(10.00)	Incorrect Price	03/13/23 1:17:09 ...	Alex Turner	Alex Turner
0				0	\$ 0.00	Incorrect Price	02/15/23 12:00:5...	Jane Smith	Jane Smith
	Note: Reject Test								
Count: 26 Total \$(1,557.85)									

Pathway: Accounting > Invoice Adjustment - Pending Approval and History