

Customer Service Screen (Accounts) - Calendar to Display Rejected Credit Memos (16625) [New Feature]

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An enhancement has been made to the Calendar on the Customer Service screen to display Rejected Credit Memos on the date they were rejected. When hovered over, a tooltip will show the reference number, amount, notes, and the rejection reason.

The screenshot displays the Customer Service screen for 'Encanto Restaurant' (Account 49033). The account is active and located at 2121 Hillhurst Ave, Los Angeles, CA 90027-2003. The account manager is Aliena Somers. The billing group is 'ADVANCE - MONTHLY' with a billed thru date of April 30, 2024. The current balance is 370.44, and the total balance is 488.69. The account is on a 'Net 20' terms and 'Printed' invoice delivery.

The 'HIGHLIGHTS' section shows pending items: Service Contract 3955 (Aliena, 05/06/2024), Service Contract 3961 (Aliena, 05/10/2024), and Courtesy Credit 11295 (Paul, 05/07/2024, Loyalty Discount).

The 'ACTIVE SERVICES (2)' section shows two services: '2 Yard Trash Service' (DDE4, 1x per week, M, \$100.00) and '2 Yard Trash Service' (DDE4, 1x per week, M, \$120.00).

The 'CALENDAR' view shows a calendar for May 2024. A tooltip is displayed for a rejected credit memo on May 7, 2024, with the following details:

- Reference: 891596
- Amount: -\$ 6.92
- Note: Adjustment Test Paul
- Rejection Reason: Incorrect Amount

Pathway: Accounts > Search > Accounts