

Refund Requests (Accounts) - Tracking User Who Created Refund (17350)

Last Modified on 10/15/2024 12:13 pm PDT

Enhancements have been made to track the user who created a refund request. This information can be viewed in the History tab of the new Edit Refund Request popup window, accessible by double-clicking the refund request in the Customer Service screen or the Refund Request Management screen within the Accounting module.

Related Release Note: [Refund Request Management](#)

The screenshot displays a refund request management interface. At the top, a summary table shows account details:

91-120	120+	TOTAL	SURCHARGE GRP	Fuel Surcharge
244.30	128.76	1,350.26	TAX REGION	Los Angeles Tax
Auto Pay Not Enabled			TAX EXEMPT	No

Below this is a 'PENDING' section with a table of refund requests:

ID	Description	Created By	Created On	Amount	Note
1002	Mail Check Customer Refund R...	Paul Smith - QA Expert (Admin)	10/09/2024	\$ 6.87	Credit for overcharge invoice #6789

The 'EDIT REFUND REQUEST' popup window is open, showing a 'History' tab with the following data:

ID	ASSIGNED TO	DEPARTMENT	STATUS	AMOUNT	CREATED BY	CREATED ON	NOTE
1002	Susan Silvestri		Submitted for Approval	6.87	Paul [Avatar] - QA Expert (A...	10/9/24 9:15 am	
1005			Returned to Submitter		Paul [Avatar] - QA Expert (A...	10/9/24 9:18 am	for testing purposes

A red arrow points from the 'Paul Smith - QA Expert (Admin)' entry in the pending list to the 'CREATED BY' column in the history table. A 'SAVE' button is visible at the bottom of the popup window.