



# Bulk Invoice Adjustment

User flow



## **Problem statement:**

In the existing approach, the user has to adjust invoice items one at a time and there is no provision to update multiple line items simultaneously.

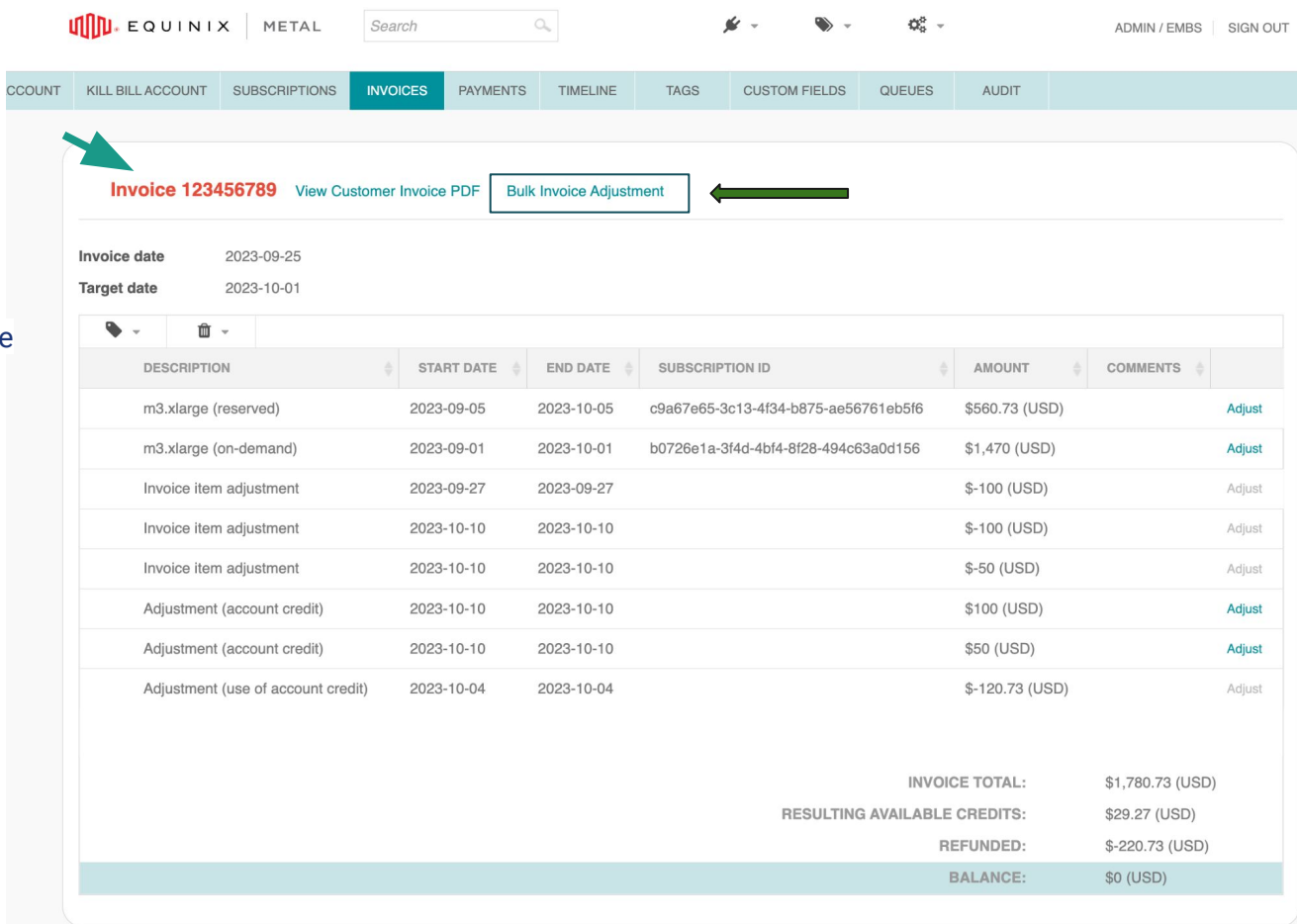


## **Solution:**

Provide a feature to adjust multiple line items at a time.

## User journey

- User login into KAUl
- Navigate to invoice screen
- Click on the **Bulk Invoice Adjustment** link
- Will be navigated to **bulk invoice adjustment** screen



The screenshot shows the Equinix Metal interface. The top navigation bar includes the Equinix logo, 'EQUINIX METAL', a search bar, and user options like 'ADMIN / EMBS' and 'SIGN OUT'. Below this is a secondary navigation bar with tabs for 'ACCOUNT', 'KILL BILL ACCOUNT', 'SUBSCRIPTIONS', 'INVOICES', 'PAYMENTS', 'TIMELINE', 'TAGS', 'CUSTOM FIELDS', 'QUEUES', and 'AUDIT'. The 'INVOICES' tab is active.

The main content area displays an invoice for 'Invoice 123456789'. A green arrow points to the invoice number, and another green arrow points to the 'Bulk Invoice Adjustment' link, which is enclosed in a green box. Below the invoice header, there are fields for 'Invoice date' (2023-09-25) and 'Target date' (2023-10-01). A table follows, listing invoice items with columns for 'DESCRIPTION', 'START DATE', 'END DATE', 'SUBSCRIPTION ID', 'AMOUNT', and 'COMMENTS'. Each row includes an 'Adjust' link. At the bottom right, a summary section shows 'INVOICE TOTAL: \$1,780.73 (USD)', 'RESULTING AVAILABLE CREDITS: \$29.27 (USD)', 'REFUNDED: \$-220.73 (USD)', and 'BALANCE: \$0 (USD)'.

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS	
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67e65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)		<a href="#">Adjust</a>
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)		<a href="#">Adjust</a>
Invoice item adjustment	2023-09-27	2023-09-27		\$-100 (USD)		<a href="#">Adjust</a>
Invoice item adjustment	2023-10-10	2023-10-10		\$-100 (USD)		<a href="#">Adjust</a>
Invoice item adjustment	2023-10-10	2023-10-10		\$-50 (USD)		<a href="#">Adjust</a>
Adjustment (account credit)	2023-10-10	2023-10-10		\$100 (USD)		<a href="#">Adjust</a>
Adjustment (account credit)	2023-10-10	2023-10-10		\$50 (USD)		<a href="#">Adjust</a>
Adjustment (use of account credit)	2023-10-04	2023-10-04		\$-120.73 (USD)		<a href="#">Adjust</a>

**INVOICE TOTAL:** \$1,780.73 (USD)  
**RESULTING AVAILABLE CREDITS:** \$29.27 (USD)  
**REFUNDED:** \$-220.73 (USD)  
**BALANCE:** \$0 (USD)

# User journey

- On **Bulk Invoice Adjustment** screen user views
  - ◆ **Invoice Number(1)**
  - ◆ **Total Adjustment Amount(2)**  
(set as 0 by default)
- Every line item have **Reasons, Comments, Adjustment Amount** and **Edit icon(3)**
- With a click of the **Edit icon**, these fields become editable
- **Save button(4)** at bottom will save form data

The screenshot shows the 'Invoice Adjustment' interface in the Equinix METAL system. At the top, there is a navigation bar with 'ACCOUNT', 'SUBSCRIPTIONS', 'INVOICES', 'PAYMENTS', 'TIMELINE', 'TAGS', 'CUSTOM FIELDS', 'QUEUES', and 'AUDIT'. The main content area is titled 'Invoice Adjustment' and contains two sections: 'Invoice Adjustment' and 'Line Items'.

**Invoice Adjustment Section:**

- Invoice Number:** 123456789 (Annotated with a green arrow and '1')
- Total Adjustment Amount:** 0 (Annotated with a green arrow and '2')

**Line Items Section:**

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	REASONS	COMMENTS	ADJUSTMENT AMOUNT
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67a65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)	100 - (	Comme	Amount
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)	100 - (	Comment	Amount
Invoice item adjustment	2023-09-27	2023-09-27		-\$100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		-\$100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		-\$50 (USD)			
Adjustment (account credit)	2023-10-10	2023-10-10		\$100 (USD)	100 - (	Comme	Amount
Adjustment (account credit)	2023-10-10	2023-10-10		\$50 (USD)	100 - (	Comme	Amount
Adjustment (use of account credit)	2023-10-04	2023-10-04		-\$120.73 (USD)			

Annotations on the Line Items table:

- An arrow labeled '3' points to the 'REASONS', 'COMMENTS', and 'ADJUSTMENT AMOUNT' columns of the first row. A tooltip below it says 'Click here to edit the line item'.

**SAVE** button (Annotated with a green arrow and '4') is located at the bottom of the form.

## User journey

→ On click of **Edit icon**, if there is no previous adjustment then full amount will be pre-populated to the **Adjustment Amount** field and also added to the **Total adjustment amount**

→ If there are any previous adjustment, then remaining amount will be pre-populated and added to the **Total adjustment amount**

→ To reset the field user can click on **Reset icon**



EQUINIX METAL Search ADMIN / EMBS SIGN OUT

ACCOUNT SUBSCRIPTIONS INVOICES PAYMENTS TIMELINE TAGS CUSTOM FIELDS QUEUES AUDIT

### Invoice Adjustment

Invoice Number **123456789**

Total Adjustment Amount **560.73**

#### Line Items

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	REASONS	COMMENTS	ADJUSTMENT AMOUNT
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67e65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)	100 - ( v	Test adjus	560.73
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)	100 - ( v	Comment	Amount
Invoice item adjustment	2023-09-27	2023-09-27		\$-100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		\$-100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		\$-50 (USD)			
Adjustment (account credit)	2023-10-10	2023-10-10		\$100 (USD)	100 - ( v	Comme	Amount
Adjustment (account credit)	2023-10-10	2023-10-10		\$50 (USD)	100 - ( v	Comme	Amount
Adjustment (use of account credit)	2023-10-04	2023-10-04		\$-120.73 (USD)			

SAVE

## User journey

- If a user types more than the maximum adjustment amount and tabs out then the row will be highlighted in red as shown here
- The user will not see the **save** button unless the line item's error is corrected

QUINIX | METAL

ADMIN / EMBS | SIGN OUT

ACCOUNT SUBSCRIPTIONS INVOICES PAYMENTS TIMELINE TAGS CUSTOM FIELDS QUEUES AUDIT

### Invoice Adjustment

Invoice Number **123456789**

Total Adjustment Amount

### Line Items

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	REASONS	COMMENTS	ADJUSTMENT AMOUNT
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67e65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)	100 - C	Test adjus	<input type="text" value="600"/> <span>⊖</span> <span>!</span>
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)	100 - C	Comment	Amount <span>✓</span>
Invoice item adjustment	2023-09-27	2023-09-27		\$-100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		\$-100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		\$-50 (USD)			
Adjustment (account credit)	2023-10-10	2023-10-10		\$100 (USD)	100 - C	Comme	Amount <span>✓</span>
Adjustment (account credit)	2023-10-10	2023-10-10		\$50 (USD)	100 - C	Comme	Amount <span>✓</span>

Adjustment amount must be less than actual amount

## User journey

- On unsuccessful save, an **error alert bar(1)** will be shown at the top of the screen
- The count of failed rows can be seen at point(2)
- Error row will be highlighted and hovering on **Info Icon(3)** will show the error reason
- On successful save, the user will be navigated back to the **Invoices** screen

Equinix METAL Search ADMIN / EMBS SIGN OUT

UNT KILL BILL ACCOUNT SUBSCRIPTIONS INVOICES PAYMENTS TIMELINE TAGS CUSTOM FIELDS QUEUES AUDIT

Error from server side please verify your chages ← 1

### Invoice Adjustment

Invoice Number 123456789

Total Adjustment Amount 100

### Line Items

1 item has error. Failed to adjust ← 2

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	REASONS	COMMENTS	ADJUSTMENT AMOUNT
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67e65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)	100 - C	Test adjus	100
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)	100 - C	Comment	Amount
Invoice item adjustment	2023-09-27	2023-09-27		-\$100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		-\$100 (USD)			
Invoice item adjustment	2023-10-10	2023-10-10		-\$50 (USD)			
Adjustment (account)	2023-10-10	2023-10-10		\$100 (USD)	100 - C	Comme	Amount

Adjustment item was failed ← 3



## User journey

- User will see success message  
**Adjustment item was successfully created.**

The screenshot shows the Equinix Metal interface. At the top, there is a navigation bar with the Equinix logo, 'EQUINIX | METAL', a search bar, and utility icons. Below the navigation bar is a menu with tabs: UNIT, KILL BILL ACCOUNT, SUBSCRIPTIONS, **INVOICES**, PAYMENTS, TIMELINE, TAGS, CUSTOM FIELDS, QUEUES, and AUDIT. A success message banner at the top reads 'Adjustment item was successfully created' with a green arrow pointing left and a close button. Below the banner, the 'Invoice 123456789' section includes links for 'View Customer Invoice PDF' and 'Bulk Invoice Adjustment'. The 'Invoice date' is 2023-09-25 and the 'Target date' is 2023-10-01. A table lists invoice items with columns for Description, Start Date, End Date, Subscription ID, Amount, and Comments. The table includes rows for reserved and on-demand services, adjustments, and account credits. A summary section at the bottom right shows the invoice total, available credits, refunded amount, and final balance.

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS
m3.xlarge (reserved)	2023-09-05	2023-10-05	c9a67e65-3c13-4f34-b875-ae56761eb5f6	\$560.73 (USD)	Adjust
m3.xlarge (on-demand)	2023-09-01	2023-10-01	b0726e1a-3f4d-4bf4-8f28-494c63a0d156	\$1,470 (USD)	Adjust
Invoice item adjustment	2023-09-27	2023-09-27		\$-100 (USD)	Adjust
Invoice item adjustment	2023-10-10	2023-10-10		\$-100 (USD)	Adjust
Invoice item adjustment	2023-10-10	2023-10-10		\$-50 (USD)	Adjust
Adjustment (account credit)	2023-10-10	2023-10-10		\$100 (USD)	Adjust
Adjustment (account credit)	2023-10-10	2023-10-10		\$50 (USD)	Adjust
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**INVOICE TOTAL:** \$1,780.73 (USD)  
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**Thank you**