**CRIM 0692 – Instant Auth - Credit Note Check Box**

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| **Ver** | **Date** | **Author** | **Comments** | **Reviewed by** |
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Requirements

A custom field is required on the Instant Authorisation screen to let AP know that an Invoice requires a Credit Note.

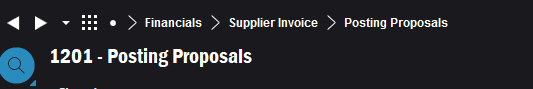
Prerequisites

<Describe any pre-requisites that this development may rely upon, data configuration or other developments>

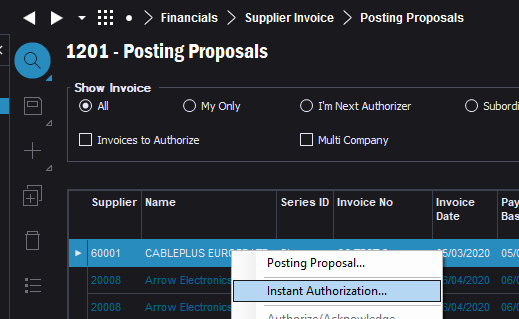
Solution Overview

* Custom checkbox called “Hold for Credit” on Instant Authorisation screen that if marked true, will trigger event when an Instant Authorisation is Authorised.
* Add column with containing “Hold for Credit” on Posting Proposal screen with associated invoice.

To navigate to the Instant Authorisation screen, go to the screen below.



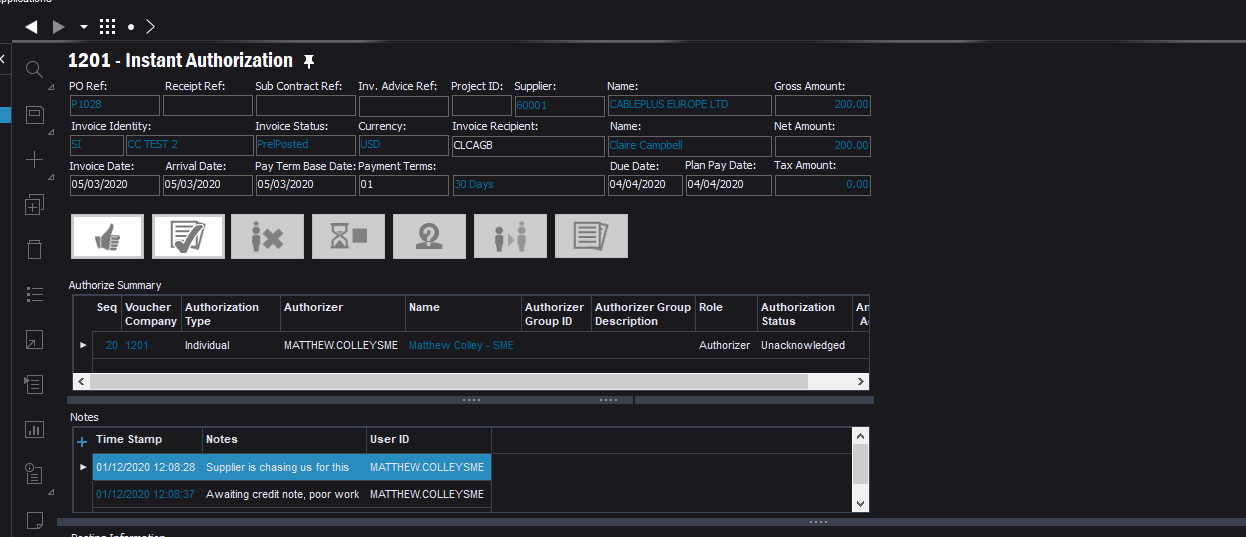
Then RMB a link in the Posting Proposal screen.



Solution Details

# Custom Check Box Location

A check box is required on the header of the Instant Authorisation screen called “Hold for Credit Note”.

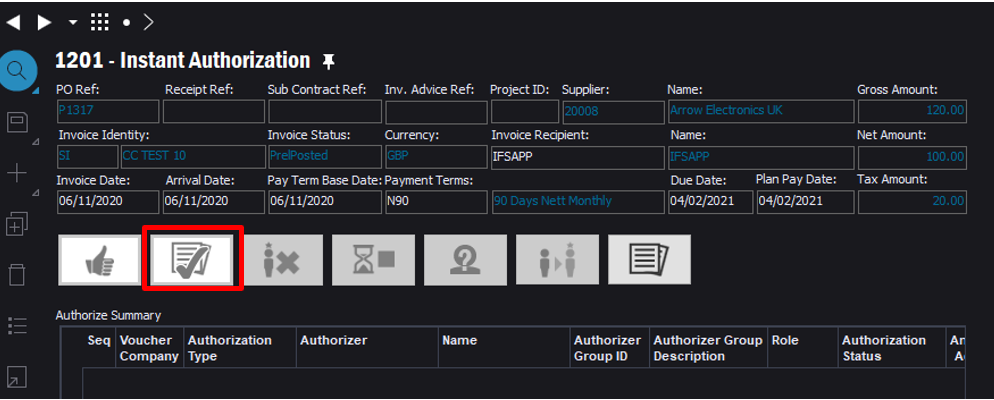


# Custom Event

**Trigger**

If the “Hold for Credit” checkbox is marked TRUE and the Instant Authorisation is set to “Authorised”

The below screenshot shows the button that will trigger the event.



**Logic**

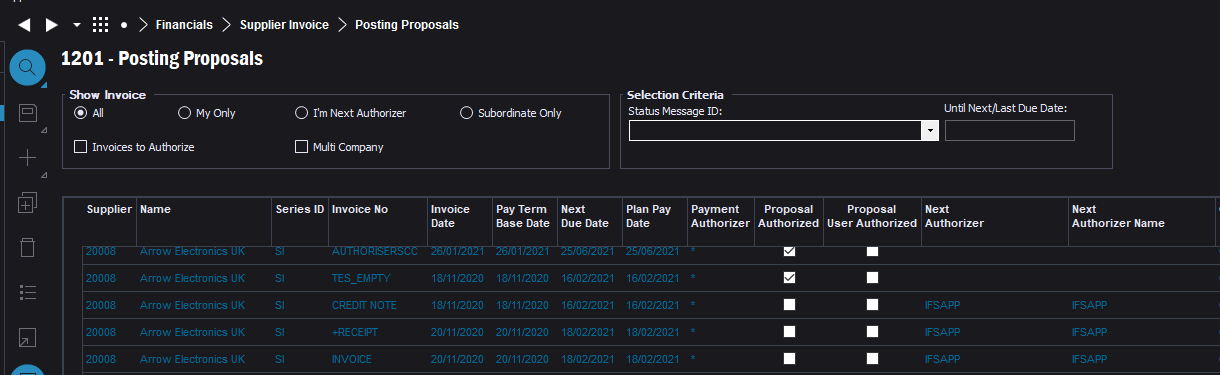
Dialogue box pop up will appear with the following text with Yes and No buttons “*Hold for credit note box will be removed when Authorised - are you sure you want to authorise?*”.

If “No” is selected, the Authorisation is aborted, and the Hold for Credit checkbox is unchanged (TRUE).

If “Yes” is selected, the Authorisation is complete, and the Hold for Credit Checkbox is marked FALSE.

# Custom Column – Posting Proposals screen

Require a custom column on the Posting Proposals screen that contains the “Hold for Credit” custom field from the above section of this spec.



**Technical.**

Field Definitions.

<New Field/CLU Definition>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| New DB Object Name | DB Object Item/Field Names | Item Description | Item Data Type | Item Syntax | Calculation Spec, if Derived | LOVs/Enums/Is Mandatory? |
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Security

<Define security controls> (Who needs access to this and will it be restricted from any other users

Companies

Applies to the following companies. All.

|  |  |
| --- | --- |
| **Company** | **Required (Y/N)** |
| 1201 | Y |
| TBC |  |
|  |  |

Data Migration

<Describe any data migration impacts this development may have – i.e additional data to be migrated>

Test Steps

<Steps that needs to be taken to test this change. Please provide expected results> Updated post solution.

|  |  |  |
| --- | --- | --- |
| **No** | **Script\Test Steps** | **Expected Result** |
| 1 |  |  |
| 2 |  |  |

Technical Implementation

<Completed by the technical developer - Technical solution, list packages, functions, Custom menus created etc >

1. Agreed to trigger an error message instead of a warning/information message – This error message will act as a flow stopper.

New Error Message is as follows,  
   
 “Hold for credit note box is checked so cannot proceed with authorisation”

Delivery Notes

**PACKAGE** – EA\_FINANCE

**Permission Granted** – IFS\_ALL

**Custom Field**

1. Posting Proposal

Note – In case the Hold for Credit custom field (column) is not available in the Posting Proposals Window, RMB of a column, Column Chooser, Add the Hold for Credit.

Graphical user interface, text, application

Description automatically generated

1. Instant Authorization

Note – In case the Hold for Credit custom field (column) is not available in the Instant Authorization Window, RMB on the header, Properties, Layout and add the custom field.

Graphical user interface, text, application

Description automatically generated

**Custom Events**

Graphical user interface, text, application, email

Description automatically generated