

Manage Credit Actions

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Credit Actions can be accessed at *A/R / Manage Credit Actions* or through the *Credit* tab on the customer file. The *Credit Actions* area is like a tickler file. It can be used for collection purposes, such as entering payment promises, or it could also be used as a reminder to contact a customer to request updated financial statements.

The screenshot shows a window titled "Manage Credit Actions" with a table of credit actions and a filter section below it.

	Date	Time	Follow-up Date	Cust ID	Customer Name	Contact	User	Amount	Category	Notes	L
1	06/08/2023	04:04 PM		WirBa	Wire, Barb		1RE	0.00	Credit Letter		
2	07/01/2023	04:06 PM		WheGF	Wheeler Farms Fuel A...	Gary Wheeler	1RE	0.00	Phone Call	Will bring...	
3	07/11/2023	03:59 PM		239135	Aichele, Domenic		1RE	0.00		Talked to...	
4	08/01/2023	04:01 PM	08/31/2019	236247	Baldon, Meri	Meri	1RE	0.00	Phone Call	Needs u...	

Filter By

Open
 Complete
 Deleted

Category: All

\$ Amount Greater Than: []

<Customer>: []

Region: All
Sub Region: All

User ID: 1RE

Date Range: Date Type: Entry
Start: 06/08/2023
End: 08/24/2023

Buttons: Delete, Print Log, Add Actions, Save, Cancel, Apply

- **Filter By** – Select the options for the entries to be shown in the grid.
- **Open/Complete/Deleted** – Determine the status of the entries to be displayed by marking the checkboxes. Any combination of these filters may be used.
- **Region/Sub-Region** – If Regions or Sub-Regions are set on the company locations, Credit Actions can be filtered by a specific Region or Sub-Region.
- **Category** – The category is user-defined when entering the Credit Actions. Select the specific category or *All*.
- **\$ Amount Greater Than** – If only actions with a dollar amount associated should be shown, mark this option and key the dollar amount in the field. Any actions with a dollar amount greater than the amount entered displays in the grid.
- **Customer** – To filter for actions pertaining to a specific customer, double-click in this field and select the customer.
- **User ID** – Credit Actions may be filtered by the *User ID* of who entered the Credit Action.
- **Date Range** – Select the *Date Type* from *Entry*, *Follow-up*, or *No Filter*. Set the *Start* and *End* dates for the entries to be displayed.
- **Delete** – This deletes the highlighted entry. Selecting **Delete** asks for a reason the record is being deleted. A reason must be entered or this action is not allowed.
- **Print Log** – Selecting this prints the entries shown in the grid.

- **Add Actions** – This allows the option to add a new entry into the grid.