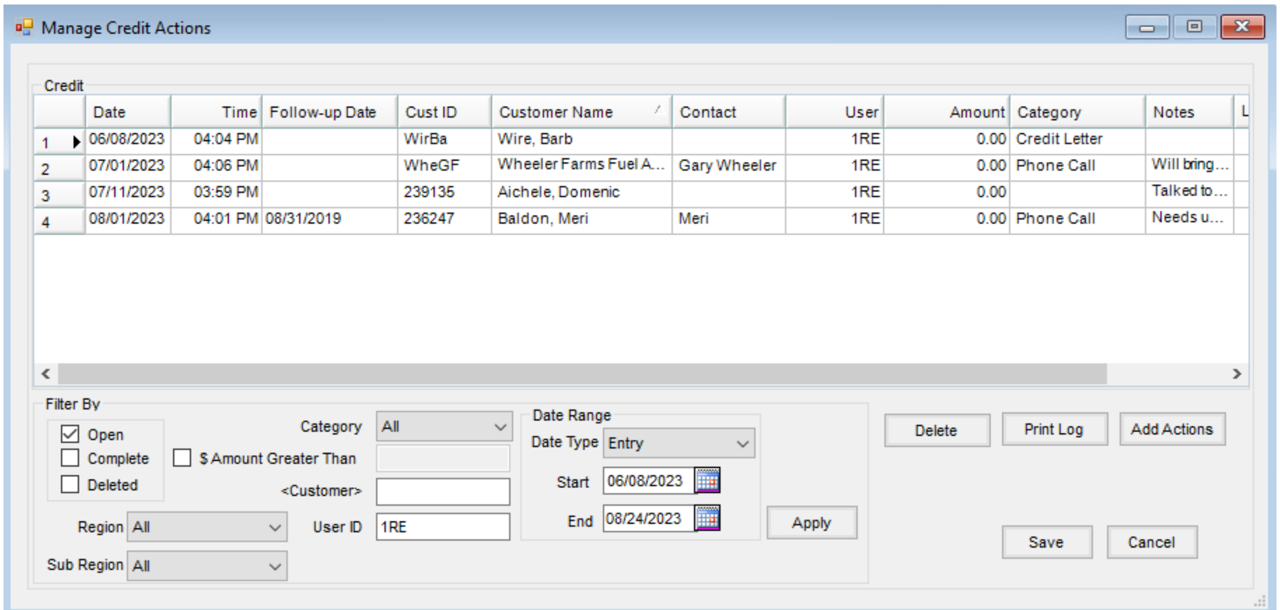
# Manage Credit Actions

Last Modified on 03/06/2026 3:17 pm CST

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.




- **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.