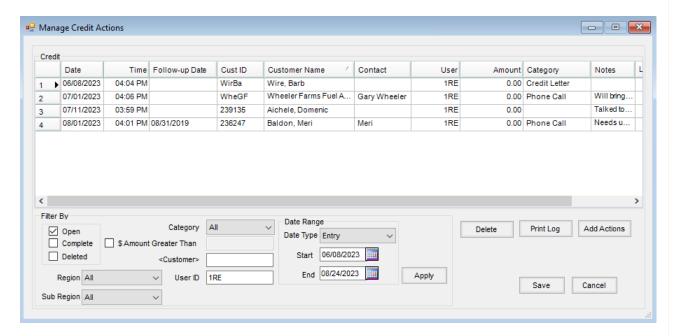
## Manage Credit Actions

Last Modified on 11/10/2023 10:26 am 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.