Account Status Changes

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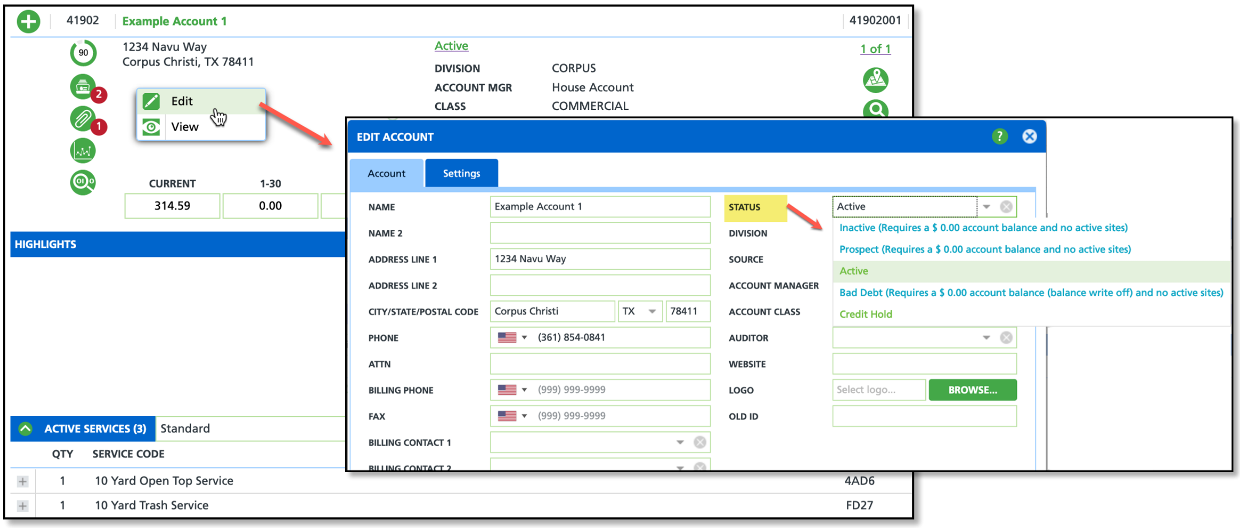
Pathway: *Accounts > Search > Account*

An account status indicates the present state or condition of a customer account within a business. When accessing an account, the current status is visible in the account section of the customer service screen. Clicking on the status will open a read-only Account History popup. Otherwise, right-clicking within the account section of the customer service screen will offer the option edit the status.

> The status of an account can be managed either manually or automatically, depending on the configuration of the account class to which the account belongs.



Status Descriptions

Status	Description
Inactive	An inactive account status refers to a customer account that is not in use and is not receiving services. After an account has been inactivated, the calendar days in the account calendar will display as gray to indicate the account is no longer active.
Prospect	A prospect status refers to a potential or prospective customer account that has not yet been converted into an active customer.
Active	An active status refers to a customer account that is currently in use and receiving services.
Bad Debt	A bad debt status refers to a customer account that has an outstanding balance or unpaid debt that is unlikely to be collected in full.
Credit Hold	A credit hold status temporarily suspends the account's ability to receive services. Account Class Setup *(Setup > Account > Account Class)* includes automation settings for updating the credit hold status when the account becomes past-due. This automation is controlled by parameters such as a minimum past due amount threshold and the number of past due days.

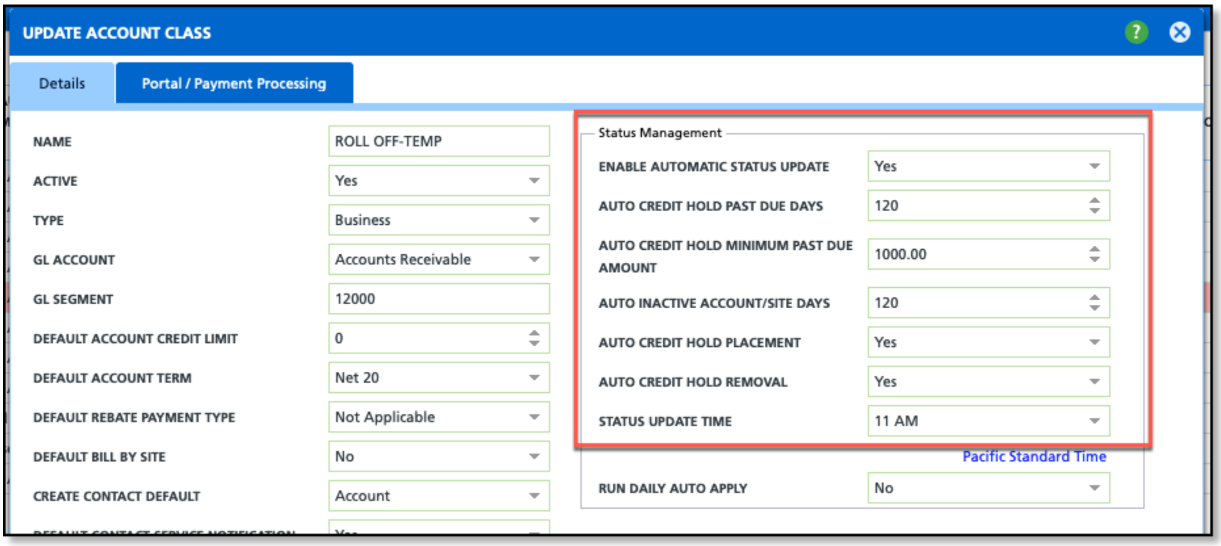
Manually Change an Account's Status

1. Search for the Account.
2. Right click on the upper left side of the screen (account section) to open the Edit Account tool.
3. Select the new **Status** of the account.
   - Upon selection, the Account History window will open to add an effective date and a note with the updated status.
4. Click **Save** when finished.

Automate Status Changes (Optional)

Pathway: *Setup > Account > Account Class*

Global settings can be implemented at the account class level to automate status updates for accounts.



Status Management Field Descriptions

Only the Status Management fields from the Add/Update Account Class screen are included below. Review the Account Class Setup article linked under Related Articles for more information about all the fields available in Account Class setup.

Additional information on Account Class can be found here: [Account Class Setup]

Field	Description
Enable Automatic Status Update	If enabled, the system will look at the additional status management settings and automatically update an account or site's status based on established criteria.
Auto Credit Hold Past Due Days	Identifies how many days an account must be past due before the credit hold is automatically applied.
Auto Credit Hold Minimum Past Due Amount	Identifies the minimum amount an account must be past due before the credit hold is automatically applied.

Auto Inactive Account/Site Days	Identifies how many days an account must be marked 'Credit Hold' before it is automatically updated to an inactive status.
Auto Credit Hold Placement	Enables the automatic credit hold placement if a past due balance exists.
Auto Credit Hold Removal	Enables the automatic credit hold removal after payment has been received.
Status Update Time	Identifies the time accounts and sites that a status change applies to will be updated.
Run Daily Auto Apply	Enables a daily check for unapplied payments and credits on an account and applies them to the account's oldest invoice balances first.

Temporary Credit Hold Removal

The "Temporary Credit Hold Removal" option is visible exclusively during an active credit hold on the account or site. This feature temporarily lifts the credit hold, using defined start and end dates, to enable servicing even if the payment hasn't been received. It's particularly useful when a customer reports mailing a payment that hasn't been received or applied, allowing the account to be temporarily released for the requested service.