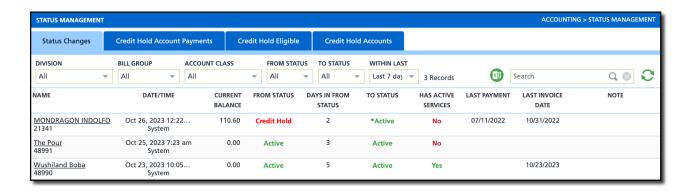
### **Status Management**

Last Modified on 11/17/2023 10:52 am EST

#### Pathway: Accounting > Status Management

The Status Management screen consists of four tabs that are primarily used to oversee and manage the status of accounts that are on, or eligible for credit hold.

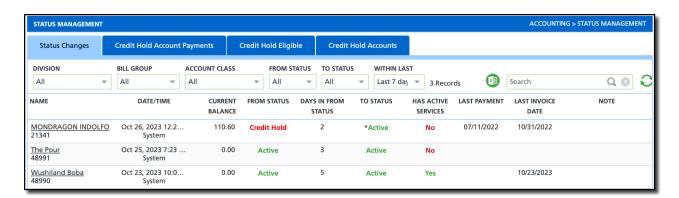


#### **Permissions**

Permission ID	Permission Name
109	View Billing
263	AR / Aging Status Management

## **Status Changes**

Using the available filtering options, the Status Changes tab can be used to review any account that has undergone any type of status change.

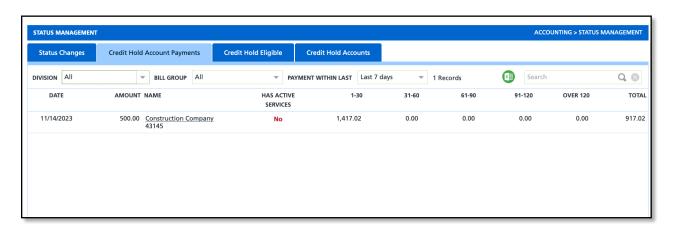


Field	Description
Filters	
Division	Filters the screen to only display accounts in the selected Division.
Bill Group	Filters the screen to only display accounts of the selected Bill Group.

Account Class	Filters the screen to only display accounts of the selected Account Class.
From Status / To	Filters the screen to only display accounts that match the status workflow going from the
Status	selected 'From Status' to the selected 'To Status.'
	Filters what accounts display on the screen based on the time frame of a qualifying status
Within Last	
VVILIIII Last	change.
Fields	
Name	Displays the name of the account.
Name	
Date/Time	Displays the date and time the account's 'From Status' was changed to the 'To Status.'
Date/Time	
	Displays the current balance on the account.
Current Balance	Displays the current balance of the account.
From Status	Displays the status the account started in.
Days In From Status	Computes the duration, in days, an account has been in the status indicated in the 'From
Days III From Status	Status' column.
	Displays the status the account was changed to.
To Status	2.05.00.)0 0.10 0.00 0.10 0.00 0.10 1.00 0.10 0
Has Active Services	Indicates if the account has active services.
nas Active Services	mulcates if the account has active services.
Last Payment	Displays the date of the last payment made on the account.
Eusti ayinciit	
Lest Invesion Data	Displays the date of the last invoice.
Last Invoice Date	
	Displays the note that was added when the account's status was changed.
Note	, ,

# **Credit Hold Account Payments**

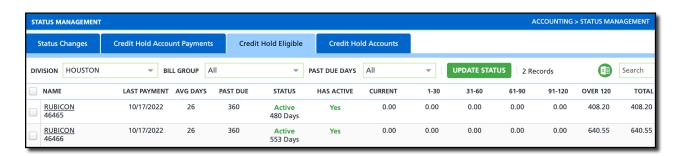
Use the *Credit Hold Account Payments* tab to review accounts in a Credit Hold status where payment has been received. This screen also provides AR History details for each account that is displayed.



Field	Description				
Filters					
Division	Filters the screen to only display accounts in the selected Division.				
Bill Group	Filters the screen to only display accounts in the selected Bill Group.				
Payment Within Last	Filters the screen to only display accounts where a payment was received within the identified time frame.				
Fields					
Date	Displays the date payment was received.				
Amount Name	Displays the name of the account.				
Has Active Services	Indicates if the account has any active services.				
1-30	Displays a total amount of all invoices that are 1 - 30 Days past due on an account.				
31-60	Displays a total amount of all invoices that are 31 - 60 Days past due on an account.				
61-90	Displays a total amount of all invoices that are 61 - 90 Days past due on an account.				
91-120	Displays a total amount of all invoices that are 91 - 120 Days past due on an account.				
Over 120	Displays a total amount of all invoices that are exceeding 120 Days past due.				
Total	Displays the total balance amount across all the invoices less than the current amount for an account.				

# **Credit Hold Eligible**

Using the available filtering options, review accounts that meet the criteria to be placed on credit hold. This screen also provides AR History details for each account that is displayed.



Filter		Description
Filters		
	Division	Filters the screen to only display accounts in the selected Division.

Bill Group	Filters the screen to only display accounts in the selected Bill Group.
Past Days Due	Limits what accounts are displayed based on how many days past due the invoice balance is.
Fields	
Name	The name of the account with the credit hold eligibility.
Last Payment	Displays the date the last payment was received.
Avg Days	Displays the average number of days for a payment to be received for an invoice for that account.
Past Due Days	Displays the amount of days that are past due from the date of the due date.
Status	Displays the status of the displayed accounts.
Has Active Services	Indicates if the account has an active service.
Current	Displays the total amount being billed for the current invoices.
1-30	Displays a total amount of all invoices that are 1 -30 Days past due on an account.
31-60	Displays a total amount of all invoices that are 31 -60 Days past due on an account.
61-90	Displays a total amount of all invoices that are 61 -90 Days past due on an account.
91-120	Displays a total amount of all invoices that are 91-120 Days past due on an account.
Over 120	Displays a total amount of all invoices that are exceeding 120 Days past due on an account.
Total	Displays the total balance amount across all the invoices less than the current amount.

# **Credit Hold Accounts**

The Credit Hold Accounts tab displays all accounts meeting the filter criteria that have a credit hold status.

STATUS MANAGEMENT									ACCOUNTING	G > STATUS MAN	AGEMENT
Status Changes	Credit Hold Acco	ount Payments	Credit Holo	l Eligible	Credit Hold Accou	nts					
DIVISION DAYTON	₩ B	ILL GROUP All		▼ MININ	IUM DAYS ON CREDI	T HOLD	- \$ Re-	cords	Sear	rch	Q
NAME	LAST PAYMENT	AVG DAYS TO PAY	STATUS	HAS ACTIVE SERVICES	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL
ROLANDO FLORES 19680	09/26/2023	9	Credit Hold 324 Days	Yes	-92.22	0.00	0.00	0.00	0.00	92.22	0.00
WILLIAMS SANDRA & 20791		67	Credit Hold 371 Days	No	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MALDONADO GINA 22054	10/25/2022	-3	Credit Hold 324 Days	Yes	0.00	0.00	0.00	0.00	0.00	49.74	49.74
ROGELIO MENDOZA 22128	11/03/2022	7	Credit Hold 324 Days	Yes	0.00	0.00	0.00	0.00	0.00	63.81	63.81
JOHNNY BELLEW 42836	08/26/2022	-1	Credit Hold 324 Days	Yes	0.00	31.69	0.00	0.00	0.00	74.85	106.54

Filter	Description					
Filters						
Division	Filters the screen to only display accounts of the selected Division.					
Bill Group	Filters the screen to only display accounts of the selected Bill Group.					
Minimum Days On Credit	Limits what accounts are displayed based on a minimum length of the time an					
Hold	account has been on credit hold.					
Fields						
Name	Displays the name of the account with the credit hold.					
Last Payment	Displays the date the last payment was received.					
Avg Days To Pay	Displays the average number of days for a payment to be received for an invoice for that account.					
Status	Displays the status of the displayed accounts.					
Has Active Services	Indicates if the account has any active service.					
Current	Displays the total amount being billed on the current invoice for an account.					
1-30	Displays a total amount of all invoices that are 1-30 Days past due on an account.					
31-60	Displays a total amount of all invoices that are 31 -60 Days past due on an account					
61-90	Displays a total amount of all invoices that are 61-90 Days past due on an account.					
91-120	Displays a total amount of all invoices that are 91 -120 Days past due on an account.					
Over 120	Displays a total amount of all invoices that are exceeding 120 Days past due on an account.					

Total	Displays the total balance amount across all the invoices less than the current amount.
-------	---