

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.

STATUS MANAGEMENT										ACCOUNTING > STATUS MANAGEMENT
Status Changes		Credit Hold Account Payments		Credit Hold Eligible		Credit Hold Accounts				
DIVISION	BILL GROUP	ACCOUNT CLASS	FROM STATUS	TO STATUS	WITHIN LAST					
All	All	All	All	All	Last 7 day	3 Records	<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="Refresh"/>			
NAME	DATE/TIME	CURRENT BALANCE	FROM STATUS	DAYS IN FROM STATUS	TO STATUS	HAS ACTIVE SERVICES	LAST PAYMENT	LAST INVOICE DATE	NOTE	
MONDRAGON INDOLFO 21341	Oct 26, 2023 12:22... System	110.60	Credit Hold	2	*Active	No	07/11/2022	10/31/2022		
The Pour 48991	Oct 25, 2023 7:23 am System	0.00	Active	3	Active	No				
Wushiland Boba 48990	Oct 23, 2023 10:05... System	0.00	Active	5	Active	Yes		10/23/2023		

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.

STATUS MANAGEMENT										ACCOUNTING > STATUS MANAGEMENT
Status Changes		Credit Hold Account Payments		Credit Hold Eligible		Credit Hold Accounts				
DIVISION	BILL GROUP	ACCOUNT CLASS	FROM STATUS	TO STATUS	WITHIN LAST					
All	All	All	All	All	Last 7 day	3 Records	<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="Refresh"/>			
NAME	DATE/TIME	CURRENT BALANCE	FROM STATUS	DAYS IN FROM STATUS	TO STATUS	HAS ACTIVE SERVICES	LAST PAYMENT	LAST INVOICE DATE	NOTE	
MONDRAGON INDOLFO 21341	Oct 26, 2023 12:2... System	110.60	Credit Hold	2	*Active	No	07/11/2022	10/31/2022		
The Pour 48991	Oct 25, 2023 7:23 ... System	0.00	Active	3	Active	No				
Wushiland Boba 48990	Oct 23, 2023 10:0... System	0.00	Active	5	Active	Yes		10/23/2023		



Screen Descriptions

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 Status	Filters the screen to only display accounts that match the status workflow going from the selected 'From Status' to the selected 'To Status.'
Within Last	Filters what accounts display on the screen based on the time frame of a qualifying status change.
Fields	
Name	Displays the name of the account.
Date/Time	Displays the date and time the account's 'From Status' was changed to the 'To Status.'
Current Balance	Displays the current balance on 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 Status' column.
To Status	Displays the status the account was changed to.
Has Active Services	Indicates if the account has active services.
Last Payment	Displays the date of the last payment made on the account.
Last Invoice Date	Displays the date of the last invoice.
Note	Displays the note that was added when the account's status was changed.

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.

STATUS MANAGEMENT										ACCOUNTING > STATUS MANAGEMENT
Status Changes		Credit Hold Account Payments			Credit Hold Eligible		Credit Hold Accounts			
DIVISION	All	BILL GROUP	All	PAYMENT WITHIN LAST	Last 7 days	1 Records		 <input type="text" value="Search"/> 		
DATE	AMOUNT	NAME	HAS ACTIVE SERVICES	1-30	31-60	61-90	91-120	OVER 120	TOTAL	
11/14/2023	500.00	Construction Company 43145	No	1,417.02	0.00	0.00	0.00	0.00	917.02	

Screen Descriptions

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.

STATUS MANAGEMENT											ACCOUNTING > STATUS MANAGEMENT		
Status Changes		Credit Hold Account Payments			Credit Hold Eligible			Credit Hold Accounts					
DIVISION	HOUSTON	BILL GROUP	All	PAST DUE DAYS	All	UPDATE STATUS		2 Records		Search			
<input type="checkbox"/>	NAME	LAST PAYMENT	AVG DAYS	PAST DUE	STATUS	HAS ACTIVE	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL
<input type="checkbox"/>	RUBICON 46465	10/17/2022	26	360	Active 480 Days	Yes	0.00	0.00	0.00	0.00	0.00	408.20	408.20
<input type="checkbox"/>	RUBICON 46466	10/17/2022	26	360	Active 553 Days	Yes	0.00	0.00	0.00	0.00	0.00	640.55	640.55

Screen Descriptions

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 > STATUS MANAGEMENT					
Status Changes	Credit Hold Account Payments	Credit Hold Eligible	Credit Hold Accounts								
DIVISION	DAYTON	BILL GROUP	All	MINIMUM DAYS ON CREDIT HOLD	5 Records	Search					
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

Screen Descriptions

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 Hold	Limits what accounts are displayed based on a minimum length of the time an 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.
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