

AR Aging Management (Accounting) - Screen Selection Updates and Enhancements to Context Menu Actions (17441)

Last Modified on 01/03/2025 6:04 am PST

The following updates have been applied to the AR Aging Management screen:

Selection Model

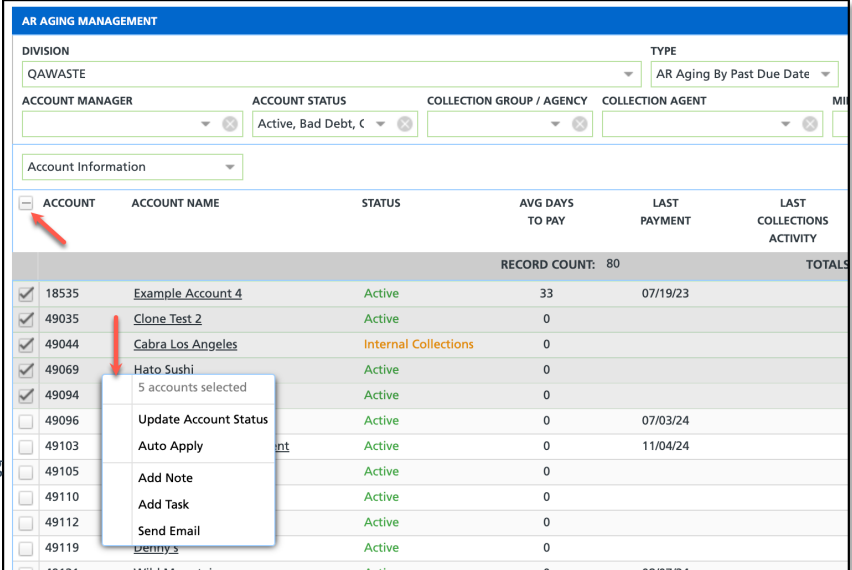
1. Left-clicking on row:

- Left-clicking anywhere within the row will cause the selection of the row.

2. Right-clicking on row:

- If the row is already selected, the Context Menu will display.
- If the row is not already selected, the following will happen:
 - Removal of all existing selections so only the right-clicked row is selected.
 - Popup of Context Menu

3. Addition of indicator to 'Select All/Deselect All' checkbox



The screenshot displays the 'AR AGING MANAGEMENT' interface. At the top, there are filters for 'DIVISION' (QAWASTE) and 'TYPE' (AR Aging By Past Due Date). Below these are fields for 'ACCOUNT MANAGER', 'ACCOUNT STATUS' (Active, Bad Debt, C), 'COLLECTION GROUP / AGENCY', and 'COLLECTION AGENT'. A section titled 'Account Information' is visible. The main table has columns: ACCOUNT, ACCOUNT NAME, STATUS, AVG DAYS TO PAY, LAST PAYMENT, and LAST COLLECTIONS ACTIVITY. A red arrow points to the 'ACCOUNT' column header. Another red arrow points to the 'Clone Test 2' row, which has a context menu open over it. The context menu includes options: '5 accounts selected', 'Update Account Status', 'Auto Apply', 'Add Note', 'Add Task', and 'Send Email'. A 'RECORD COUNT: 80' is shown at the bottom right of the table area.

ACCOUNT	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIONS ACTIVITY
<input checked="" type="checkbox"/>	18535	Example Account 4	Active	33	07/19/23
<input checked="" type="checkbox"/>	49035	Clone Test 2	Active	0	
<input checked="" type="checkbox"/>	49044	Cabra Los Angeles	Internal Collections	0	
<input checked="" type="checkbox"/>	49069	Hato Sushi	Active	0	
<input checked="" type="checkbox"/>	49094	5 accounts selected	Active	0	
<input type="checkbox"/>	49096	Update Account Status	Active	0	07/03/24
<input type="checkbox"/>	49103	Auto Apply	Active	0	11/04/24
<input type="checkbox"/>	49105	Add Note	Active	0	
<input type="checkbox"/>	49110	Add Task	Active	0	
<input type="checkbox"/>	49112	Send Email	Active	0	
<input type="checkbox"/>	49119	Benny's	Active	0	
<input type="checkbox"/>	49121	Wild Mountain	Active	0	08/07/24

Context Menu

When the Context Menu displays, it will include the total count of selected accounts. Additionally, the order in which options are displayed was updated.

AR AGING MANAGEMENT

DIVISION: QAWASTE TYPE: AR Aging By Past Due Date

ACCOUNT MANAGER: ACCOUNT STATUS: Active, Bad Debt, C COLLECTION GROUP / AGENCY: COLLECTION AGENT:

Account Information:

ACCOUNT	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIONS ACTIVITY
RECORD COUNT: 80 TOTALS					
<input checked="" type="checkbox"/>	18535 Example Account 4	Active	33	07/19/23	
<input checked="" type="checkbox"/>	49035 Clone Test 2	Active	0		
<input checked="" type="checkbox"/>	49044 Cabra Los Angeles	Internal Collections	0		
<input checked="" type="checkbox"/>	49069 Hato Sushi	Active	0		
<input checked="" type="checkbox"/>	49094	Active	0		
<input type="checkbox"/>	49096	Active	0	07/03/24	
<input type="checkbox"/>	49103	Active	0	11/04/24	
<input type="checkbox"/>	49105	Active	0		
<input type="checkbox"/>	49110	Active	0		
<input type="checkbox"/>	49112	Active	0		
<input type="checkbox"/>	49119	Active	0		
<input type="checkbox"/>	49121	Active	0	08/07/24	

Edit Account Status History

Previously, the 'Update Account Status' option was only available when a single record was selected. With this update, you can now update the status of multiple accounts simultaneously.

AR AGING MANAGEMENT

DIVISION: QAWASTE, HOUSTON TYPE: AR Aging By Past Due Date ACCOUNT CLASS: asdf, AUTOCH, BROKER, CLASST

ACCOUNT MANAGER: ACCOUNT STATUS: Active, Bad Debt, C COLLECTION GROUP / AGENCY: COLLECTION AGENT: MIN. PAST DUE BALANCE:

Contact Information:

ACCOUNT	ACCOUNT NAME	CONTACT 1	CONTACT 2	STATUS	HAS ACTIVE SERVICE
<input checked="" type="checkbox"/>	18557 CITY OF LIBERTY				
<input checked="" type="checkbox"/>	21198 Example Account 3				
<input checked="" type="checkbox"/>	39465 QA REGIONAL MEDICAL CENTER				
<input checked="" type="checkbox"/>	43190				
<input checked="" type="checkbox"/>	43191				
<input type="checkbox"/>	43192				
<input type="checkbox"/>	43193				
<input type="checkbox"/>	43206				
<input type="checkbox"/>	43207				
<input type="checkbox"/>	43208				
<input type="checkbox"/>	43209 LR TRANSPORT				
<input type="checkbox"/>	43223 COMPOSI TECH INC				
<input type="checkbox"/>	43224 PIPE & TUBE SUPPLIES			Active	Yes
<input type="checkbox"/>	43225 DDS SYNERGY SHADOW CREEK LLC	DDS Synergy Shadow Creek LLC		Active	Yes
<input type="checkbox"/>	43226 RELIABLE SIGNAL & LIGHTING	invoices		Active	Yes

CHANGE STATUS OF 5 SELECTED ACCOUNTS

NEW STATUS: EFFECTIVE DATE: COLLECTION GROUP / AGENCY:

NOTE:

SAVE