How to Add an Account Status Code

1. On Sales folder, click the Account Status Codes menu. This will open a new Account Status Code screen if there is no existing record yet. If not, the integrated search grid will be displayed.



4. Click Save button.

If the origin integration is enabled, the Status Code field will be disabled upon saving.

1. On Sales folder, click the Account Status Codes menu. If there is no existing record yet, it will open a new Account Status Codes screen. The A ccount Status Code search grid will be docked at the center panel.

2. On search grid, click the New toolbar button.

	× *	Account Status Code	
Filter Menu	a		
Purchasing	-		
Sales		New View Open All Refresh Export Close	
📝 Quotes		🔚 Layout 🗸 🍞 Filter Records (F3) 7 records	
🥜 Sales Orders		Account Status Code 🔺	Description
nvoices			Agricultural
📝 Receive Payments			Commercial
🌈 Receive Payment Details			Crop Drver
ng Batch Posting			Generators
ng Batch Printing			Home Heat
🌈 Import Invoices from Origin			Deceller
🥜 Import Billable from Help Des	¢		Example Covernment
ng Calculate Service Charge		× *	Exempt Government
nvoice Charge Invoice			
🥜 Import Invoices from CSV			
📝 Import Logs			
Customers			
Oustomer Contact List			
Sales Reps			
Market Zone			
Omment Maintenance			
Service Charges			
Customer Groups			
Account Status Codes			

3. Enter a Status Code and its Description. Refer to Account Status Code for the description of each fields.

Account Statu	Account Status Code - 1				
	🔍 🔂 🔗 🖪				
New Save	Search Delete Undo Close				
Status Code:	1				
Description:	Board Members				
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Click Save button.					

If the origin integration is enabled, the Status Code field will be disabled upon saving.

1. On Sales folder, click the Account Status Codes menu. If there is no existing record yet, it will open a new Account Status Codes screen. The A ccount Status Code search grid will be docked at the center panel.

2. On search grid, click the New toolbar button.

menu		Account Status Code	
Purchasing	•		
🚞 Sales			
🧹 Sales Orders		Hayout • 🍸 Filter Records (F3) 3 records	
📝 Quotes		Account Status Code 🔺	Description
nvoices		1	i21
🥜 Credit Memos			i21 General Ledger
neceive Payments		3	i21 Purchasing
🌈 Receive Payment Details			121 Forenability
ng Batch Posting			
🏹 Import Invoices from Origin	4		
🏹 Import Billable from Help Desk	h		
Customers			
Customer Contact List			
i Sales Reps			
Market Zone			
Statement Footer Messages			
Service Charges			
Oustomer Groups			
😳 Account Status Codes 🦯			
Quote Template			
iiii Tax Report			
Customer Aging Report	-		

3. Enter a Status Code and its Description. Refer to Account Status Code for the description of each fields.

New Save Search Delete Undo Close	
Status Code: 1	
Description: Board Members	
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4. Click Save button.

If the origin integration is enabled, the Status Code field will be disabled upon saving.

 On Accounts Receivable > Maintenance, double click the Account Status Codes menu. If there are existing records, this will open the Search Account Status Code screen. Otherwise, a new Account Status Codes screen will be displayed. If search screen is rendered, proceed to step 2. If the Account Status Codes screen is rendered, continue to step 3.



3. Enter a Status Code and its Description. Refer to Account Status Code for the description of each fields.

Count Status Codes - 1				
New Save S	Search Delete Undo Close			
Status Code: Description:	1 Board Members			
🕜 😟 🏆 Edite	ed I Page 1 of 1			

4. Click Save button.