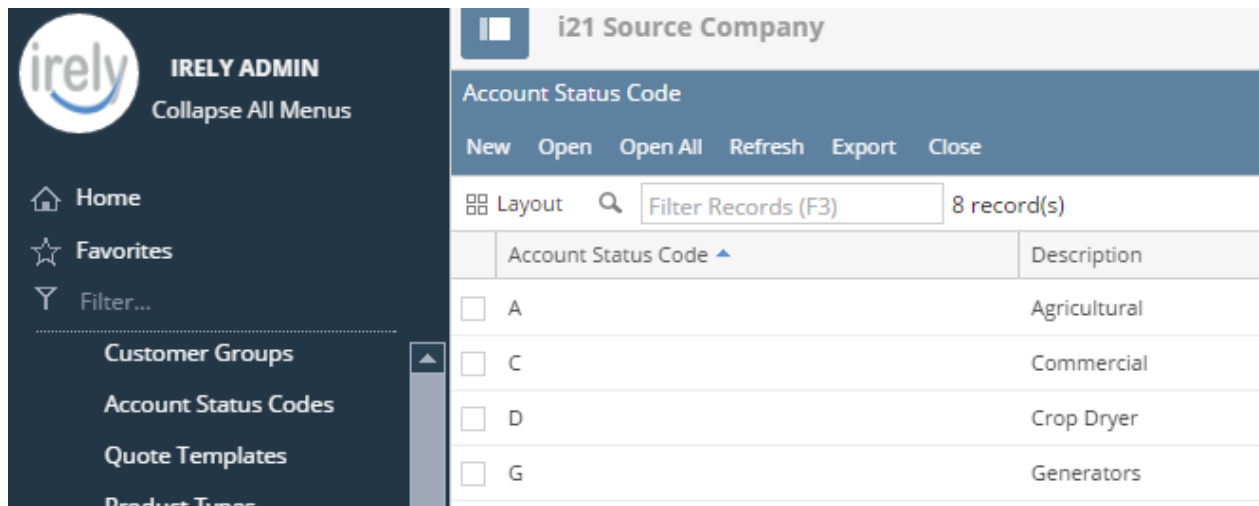


How to Open Account Status Code screen

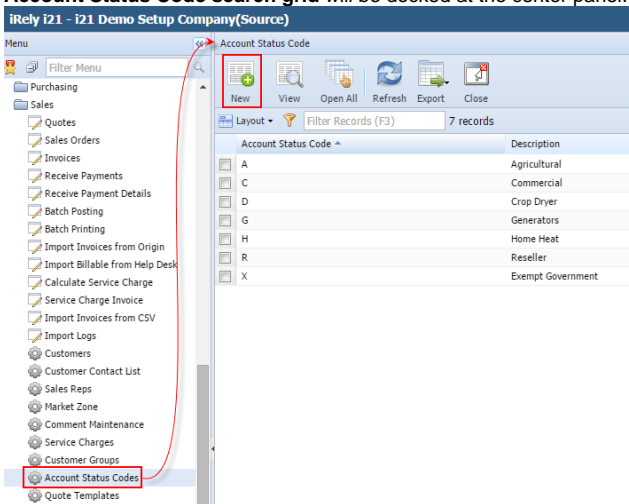
On **Sales folder**, click the **Account Status Codes menu**. If there is no existing record yet, this will open a new Account Status Code screen. The **Account Status Code search grid** will be docked at the center panel. From here, you can open an existing record or add a new record by clicking the **New button**.



There are two ways to view an Account Status Code screen.

From Account Status Codes menu

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



From Entity (Customer) screen

1. Open a [Customer Entity](#) record.

2. On Entity screen | Customer tab | Detail tab, click the **Status magnifying button**. If the Status field is not blank, the button will open the Account Status Code record assigned to the customer. Otherwise, it will open a new Account Status Code screen.

Entity - ABC Reseller

Customer

Detail

Type: Company

Account No:

Currency: USD

Credit Limit: 0.00


Terms: Due on Receipt

Ship Via:

AR Balance: 0.00

Salesperson:

Warehouse:

Status: 

Legacy Customer ID: 0001005066

Pricing: None

Bill To:

Ship To:

Tax No:

Exempt All Taxes:

County:

Print 1099:

1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Jira Customer:

There are two ways to view an Account Status Code screen.

From Account Status Codes menu

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

Menu

Filter Menu

Purchasing

Sales

Sales Orders

Quotes

Invoices

Credit Memos

Receive Payments

Receive Payment Details

Batch Posting

Import Invoices from Origin

Import Billable from Help Desk

Customers

Customer Contact List

Sales Reps

Market Zone

Statement Footer Messages

Service Charges

Customer Groups

Account Status Codes

Quote Template

Tax Report

Customer Aging Report

Account Status Code

New View Open All Refresh Close

Layout Filter Records (F3) 3 records

Account Status Code	Description
1	i21
2	i21 General Ledger
3	i21 Purchasing

From Entity (Customer) screen

1. Open a **Customer** Entity record.

- On Customer > Detail tab, click the **Status magnifying button**. If the Status field is not blank, the button will open the Account Status Codes record assigned to the customer. Otherwise, it will open a new Account Status Codes screen.

Entity - ABC Reseller

Entity Customer Locations Contacts Notes History Attachments Messages

Detail Misc Splits Pricing Taxing Grain Agrimine Patronage Farm Help Desk Transports Commission Buyback Contracts Field xRef

Type: [Dropdown] Bill To: ABC Reseller

Account No: [Text] Ship To: ABC Reseller

Currency: USD Tax No: [Text]

Credit Limit: 0 Tax Exempt: [Checkbox]

Terms: 5% 5 Net 30 County: [Text]

Ship Via: FedEx Ground Print 1099: No

AR Balance: 0.000000 1099 Name: [Text]

Salesperson: 0001005005 1099 Form: [Text]

Warehouse: [Text] 1099 Type: [Text]

Status: [Text] Federal Tax ID: [Text]

Legacy Customer ID: 0001005007 W9 Signed: [Text]

Pricing: None Jira Customer: [Text]

Options: Active: [Checked] Prospect: [Unchecked] PO Required: [Unchecked] Credit Hold: [Unchecked]

Ready Page 1 of 1

There are two ways to view an Account Status Codes screen.

From Account Status Codes menu

- 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.

Accounts Receivable

Activities

Maintenance

Customers

Customer Contact List

Salesperson

Market Zone

Statement Footer Message

Service Charge

Customer Group

Account Status Codes

Help Desk

Inventory

Payroll

Contract Management

Account Status Codes -

New Save Search Delete Undo Close

Status Code: [Text]

Description: [Text Area]

Ready Page 1 of 1

From Customer screen

- Open a [Customer Entity](#) record.
- On Detail tab, click the **Status ellipsis button**. If the Status field is not blank, the button will open the Account Status Codes record assigned to the customer. Otherwise, it will open a new Account Status Codes screen.

Customer - Home Dealers

New Save Search Delete Undo Additional Close

Detail Additional Locations Contacts Notes History Attachments Custom Messages Setup Additional Setup

Customer No: 1000000001 Name: Home Dealers Type: Company

Contact: Sarah Lopez Phone: (781) 438-2033 x568 Email: sarah.lopez@homedealers.com

Locations: US

Address: 18 Central St.

Zip/Postal: 43320 City: Edison

State/Province: OH Country: United States

Alt Phone: (515) 954-3542 Alt Email: s_lopez@homedealers.co

Active: [Checked] PO Required: [Unchecked] Credit Hold: [Unchecked]

Credit Limit: 0.00 AR Balance: 0.00

Account No: [Text] Tax No: [Text]

Ship Via: UPS Ground Terms: 5% 5 NET 30

Currency: USD Status: [Text]

Salesperson: [Text] Warehouse: [Text]

Pricing: None

Ready