

QUICK REFERENCE GUIDE

November 1, 2019

Review Overdue Charges

This guide covers two options for reviewing overdue charges:

- Option 1: Review All Overdue Charges for a Customer or Overdue Charge Number
- Option 2: Review the Last Overdue Charges Created

Option 1: Review All Overdue Charges

You can use the Review Overdue Charges page to review all overdue charges for a customer or Overdue Charge Number.

1. Navigate to the *Review Overdue Charges* page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, left-menu, Overdue Charges, Review Overdue Charges.

2. At the *Review Overdue Charges* page, enter your search criteria.

Field Name	Field Description
SetID	Select the <i>SetID</i> . The <i>SetID</i> is where the customer exists. In most cases the <i>Business Unit</i> and the <i>SetID</i> are the same unless a <i>Business Unit</i> shares customers with a different business unit.
Correspondence Customer	Optionally, enter a <i>Correspondence Customer</i> or use the Lookup to select a <i>Correspondence Customer</i> .
Overdue Charge Number	Optionally, enter the <i>Overdue Charge Number</i> that you want to view or use the Lookup to select an <i>Overdue Charge Number</i> . This number is assigned when you run the Overdue Charge Process. Refer to the "Run Overdue Process" guide for more information.

3. Click on the **Search** button.

Review Overdue Charges

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

SetID =

Correspondence Customer begins with

Overdue Charge Number =

[Basic Search](#)

Search Results

View All

SetID	Correspondence Customer	Overdue Charge Number
G1001	TRN000001	1536

- If there is more than one entry in the *Search Results* listing, click on the link for the Overdue Charge you want to view.

Review Overdue Charges

SetID G1001 Overdue Charge Number 1536
 Customer TRN000001 TRAINING.CUSTOMER1 Overdue Charge Date 09/01/2018

Overdue Charges Details

Location 1 Overdue Charges 0.91 Currency USD
 Item Balance 0.91 Balance Currency USD

Overdue Charges Items

	Unit	Customer	Short Name	Item ID	Line	Overdue Charge Amt	Entry Type	Reason	Current Item Amount
1	G1001	TRN000001	TRAINING C	TRAIN000001	2	0.88	OC	FIN	0.88
2	G1001	TRN000001	TRAINING C	TRAIN000002	2	0.03	OC	FIN	0.03

The *Review Overdue Charges* page displays showing information about the Overdue Charge including the *Item ID* assigned, amount, and reason code.

Option 2: Review Last Overdue Charge

You can also view only the last overdue charges applied.

1. Navigate to the Review Last Overdue Charges page by following one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, Overdue Charges, Review Overdue Charges.

2. At the *Review Overdue Charges* page, enter your search criteria.

Field Name	Field Description
SetID	Select the <i>SetID</i> . The <i>SetID</i> is where the customer exists. In most cases the <i>Business Unit</i> and the <i>SetID</i> are the same unless a <i>Business Unit</i> shares customers with a different business unit.
Correspondence Customer	Optionally, enter a <i>Correspondence Customer</i> or use the Lookup to select a <i>Correspondence Customer</i> .
Overdue Charge Number	Optionally, enter the <i>Overdue Charge Number</i> that you want to view or use the Lookup to select an <i>Overdue Charge Number</i> .
Business Unit	Accept the default <i>Business Unit</i> or click on the Lookup icon and select a <i>Business Unit</i> . (The <i>Business Unit</i> is the where the receivable exists.)
Customer ID	Optionally, enter a <i>Customer ID</i> or use the Lookup to select a Customer ID.

3. Click on the **Search** button. The Review Last Overdue Charges page displays showing information about the Overdue Charge including the Item ID assigned, amount, and reason code.

Review Overdue Charges

SetID G1001 Overdue Charge Number 1536
 Customer TRN000001 TRAINING CUSTOMER1 Overdue Charge Date 09/01/2018

Overdue Charges Details 1 of 1

Location 1 Overdue Charges 0.91 Currency USD
 Item Balance 0.91 Balance Currency USD

Overdue Charges Items 1-2 of 2

	Unit	Customer	Short Name	Item ID	Line	Overdue Charge Amt	Entry Type	Reason	Current Item Amount
1	G1001	TRN000001	TRAINING C	TRAIN000001	2	0.88	OC	FIN	0.88
2	G1001	TRN000001	TRAINING C	TRAIN000002	2	0.03	OC	FIN	0.03

Return to Search Notify