

Account User Codes

Finance Charge, Account, and User-Defined Codes

This two-page job aid provides a place to reference default account and finance charge user codes defined in CS SoftDent practice management software. It also provides a place to record any user-defined codes your practice might use. Default codes are indicated in the table below by gray shading.

Code	Definition
A	
B	
C	Collections – No statement will be generated; excluded from account aging.
D	
E	
F	
G	
H	
I	Inactive – No statement will be generated; excluded from account aging.
J	
K	
L	Legal matter – No statement will be generated; excluded from account aging.
M	Messages –Statement will print the Notes field of the Account window.
N	No statement will be generated for this account.
O	
P	
Q	
R	
S	
T	
U	
V	
W	
X	Insurance estimation turned off for the account.
Y	Statement will not include dunning messages. Note: This applies to automated/electronic statements only and does not affect paper billing statements.
Z	Account should not be charged finance or billing fees.

Finance Charge, Account, and User-Defined Codes continued. . .

Code	Definition
F3	Account will accrue finance charges after it is 30 days past due.
F6	Account will accrue finance charges after it is 60 days past due.
F9	Account will accrue finance charges after it is 90 days past due.
~ (Tilde)	Account will not receive a statement for its fixed budget plan.
1	
2	
3	
4	
5	
6	
7	
8	
9	