



System Settings | Action Codes



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ACTION CODES

Overview

The **Action Codes** folder is a system setting that contains a list of Action Code Descriptions. An Action Code is a suffix level, credit union defined, one-character, alpha-numeric field. Each action code must be assigned a description before it can be used.

Action Code Descriptions are displayed in the suffix detail and on various reports. Action codes can be used as part of a selection criteria to create reports or extracts using Query (Optional Software).

Credit Unions can add, edit, and delete action codes descriptions by using the ribbon or standard VIEW context menu. The Action Code parameters are located in [\[Main Ribbon > System Settings> Action Codes\]](#).

ACTION CODE	DESCRIPTION
 S - Loan	Special Loans
 B - Share	Baby Boomers
 C - Loan	Cash
 E - Loan	Mortgage with Escrow
 M - Share	Minors
 N - Loan	No Collections
 P - Loan	Payroll
 S - Share	Seniors
 T - Loan	Transfer

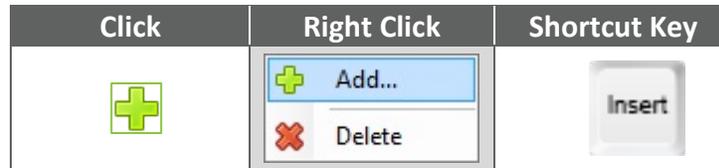
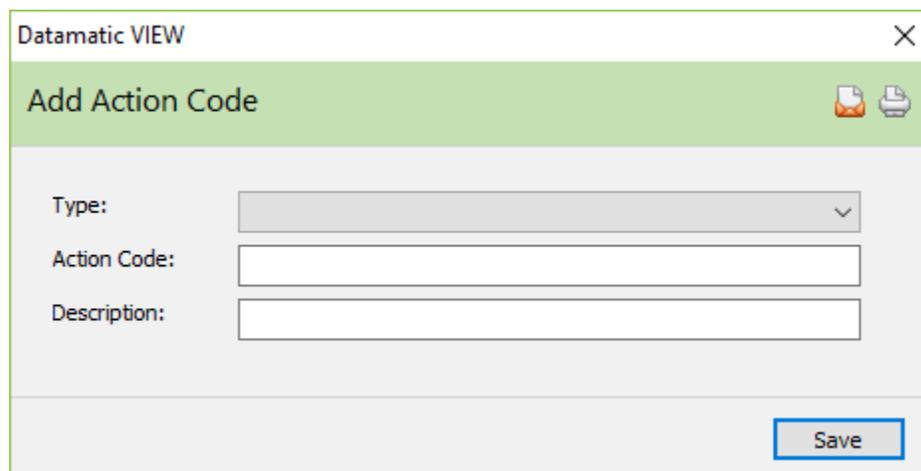


Note

An action code has separate descriptions for shares and loans.

Add Action Code

The **Add Action Code** screen allows user to enter an action code description. The screen can be launched by:

Field	Comments	
Type	Account Type:	
	Share	Action Code applies to share suffixes
	Loan	Action Code applies to loan suffixes
Action Code	Credit Union defined	
Description	Credit Union defined	



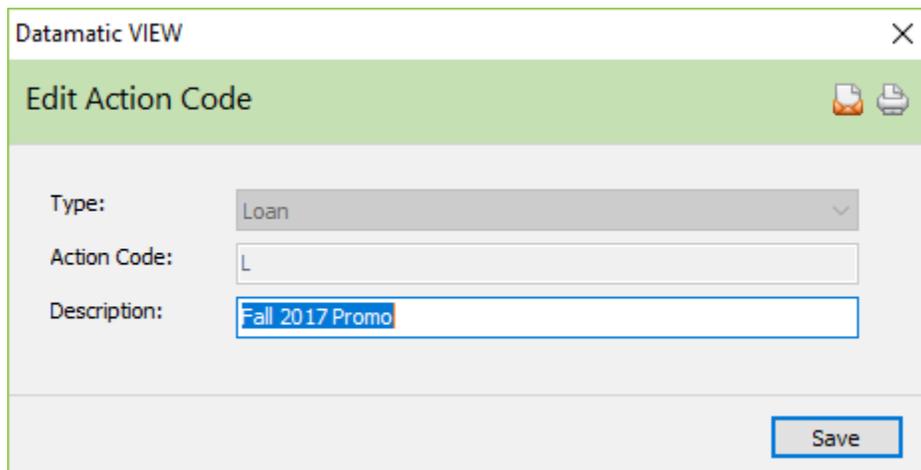
Note

Action code descriptions that apply to both shares and loan suffixes must be added for each account type.

Edit Action Code

The **Edit Action Code** screen allows user to modify the action code description. The screen can be launched by:

Double Click	Right Click	Shortcut Key
Item	None	Enter



Datamatic VIEW

Edit Action Code

Type: Loan

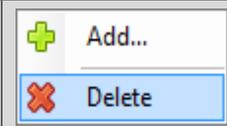
Action Code: L

Description: Fall 2017 Promo

Save

Delete Action Codes

Deleting an Action Code removes **only** the description. Action Codes can be deleted by:

Click	Right Click	Shortcut Key
		



Note

The member suffix action code is NOT removed when the action code description is deleted. Contact Support for assistance in clearing inactive action codes from member suffixes.