Using Action Tabs

The Action Tabs are the row of buttons that span the top of the Primary Window. They provide access to various functions within SAL, such as searching for a borrower, applying a payment, and viewing transaction history.

Action Tab	Purpose
Search	Used to find a specific borrower account.
Adv	Used to process and view advances.
Name	Shows the people who are named on a loan. It includes the borrower's name, co-signors (if applicable), and names of known references. The Name action tab can also be used to access the Change Demographic Data screen and to view/set-up ACH payments.
Cash	Used to process payments.
Collection	The Collection Action Tab can be used by in-house collectors to manage accounts that are past due. It provides a detailed account summary.
Adjust	Used to make a loan adjustment. Adjustments include adding NSF fees, applying a refund, or adjusting a payment.
Def	Used to apply a deferment to a loan or view existing deferment information.
Canc	Used to process a loan cancellation or view an existing cancellation.
History	Shows a complete transaction history for the account. The information can be sorted by transaction type.
Memo	Provides access to memos that are on the account. Memos are created automatically by SAL when certain functions are performed (such as posting a payment). They are also added manually when ECSI has contact with a borrower.
Forms	Used to access various forms and profiles.
Utility	Provides access to configuration screens, as well as account history information. Billing history, credit bureau history, and past bills are all available through the Utility Action Tab.
Run	Provides access to advanced utilities, including the Out of Balance report and Calc utilities.
Optional	Displays the account options that apply to the account. The options are school-specific and are based on the features the school requests and pays ECSI to provide.
Help	Currently not in use. Please refer to http://client.ecsi.net/training/index.html for training documents.