How to Set up Automatic Credit Control Review Dates on a Case Type

Max Mazo - 2025-11-03 - Comments (0) - Forms, Precedents and Templates

How to Set up Automatic Credit Control Review Dates on a Case Type

This guide details the process of configuring an automatic review period for invoices which are generated under a specific case type. This feature is vital for **Credit Control** teams which need to ensure a consistent follow-up schedule is applied to new matters and which need to simplify the tracking of outstanding invoices.

Prerequisites

- You must be an **Admin** user to access the system **Configuration** menu which allows you to modify case types.

- Please note: this automatic review date setting will **only affect matters which are created after** this change has been made. It will not retrospectively apply to existing cases.

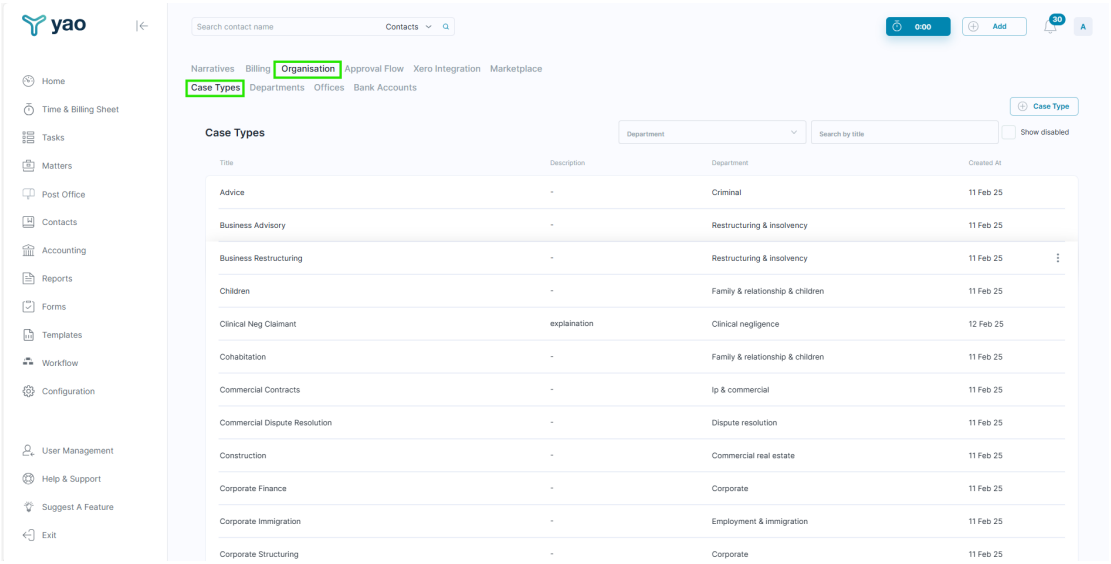
Configuring the Automatic Review Date

The steps below can be used whether you are creating a new case type or editing an existing one, as the configuration window is the same in both instances.

1. Navigate to the left-hand side menu and click the **Configuration** tab, which is marked with a **cog icon**.

2. In the main window, click the **Organisation** tab along the top.

3. Click the **Case Types** sub-tab to view a list of all current case types.



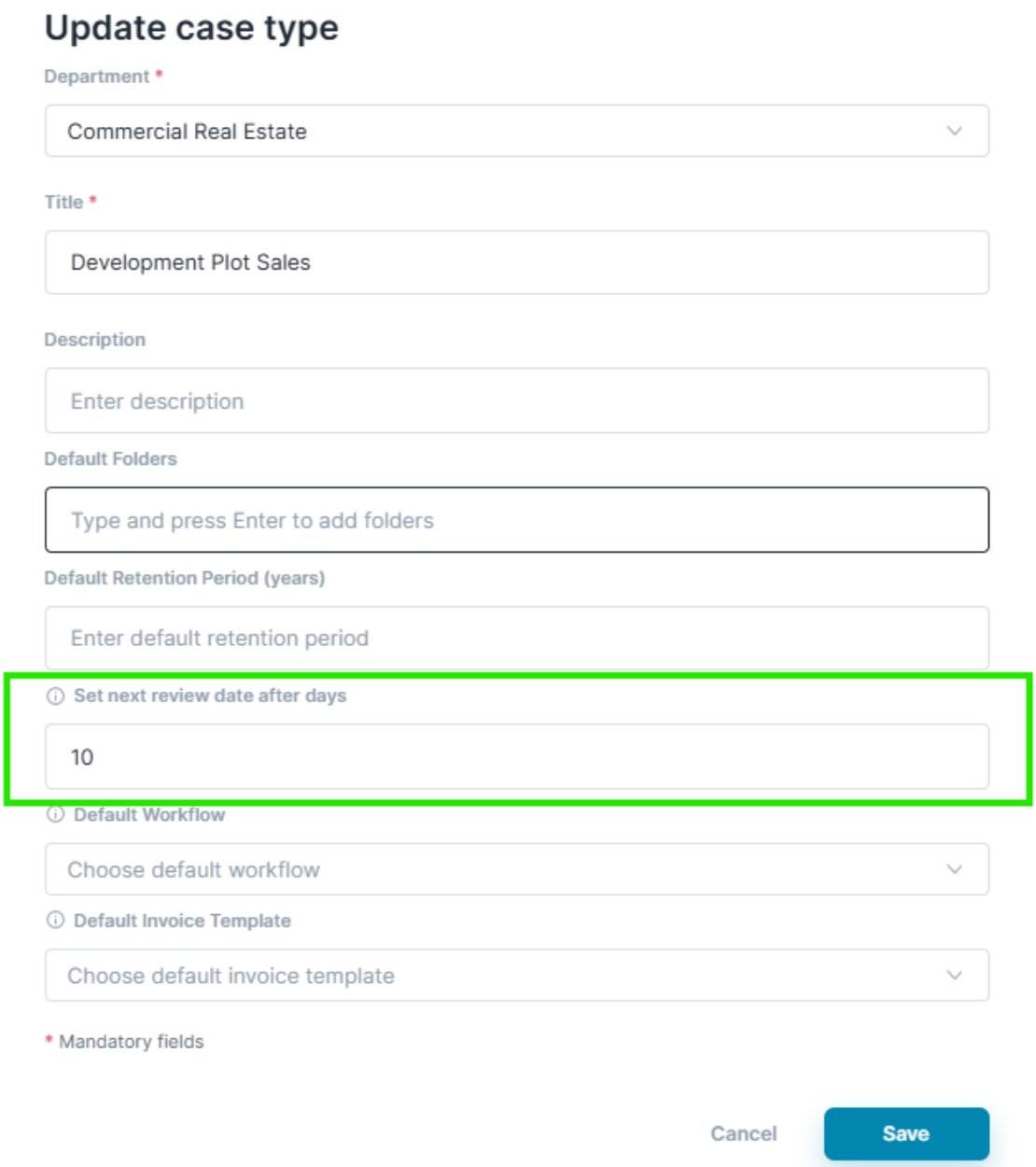
1. You now have two paths to access the configuration window:

- **To edit an existing case type**: Locate the case type in the list, click the **ellipses** (...) menu on the far right, and select **Edit**.

- **To create a new case type**: Click the blue **Case Type** button in the upper-right corner.

1. In the centre of the 'Update case type' or 'Create case type' window, scroll down to the **Set next review date after days** field.

2. Enter the number of days for the review period (e.g., 10). The system will automatically set the next review date for every new invoice which is generated under this case type, which is what will ensure a timely follow-up. If you hover over the information (i) icon, it confirms the setting is great for Credit Control teams and that the invoice will be listed in the Accounting, Invoices, and Credit Control tabs.



1. Click the Save button at the bottom of the window. The Case type will now be updated successfully, and the setting will be active for all newly created matters.