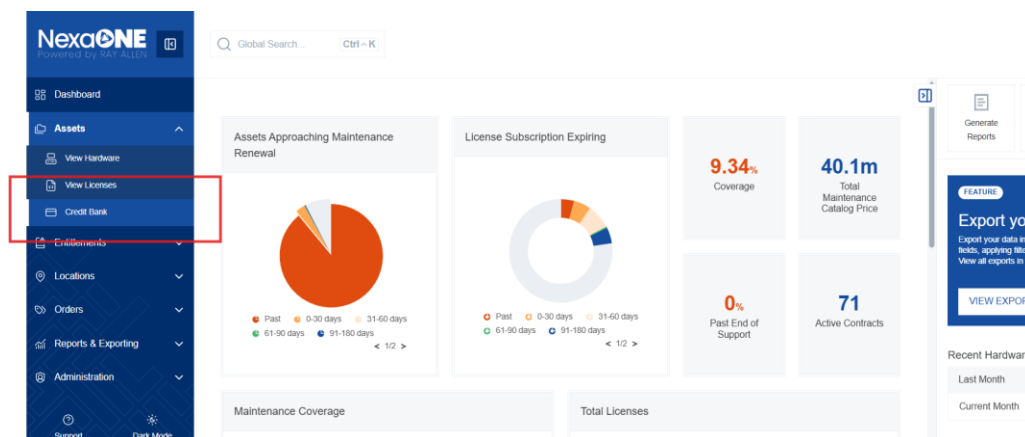


# Asset Management > Credit Bank > View Credit Bank

## Access Credit Bank

This section explains how to access the Credit Bank within NexaOne.

- **Navigate to the Assets section:** From the main menu in NexaOne, locate and click on the "Assets" section. This section provides access to various asset-related features, including the Credit Bank.
- Within the "Assets" section, find and select "Credit Bank". This action will display a list of all items currently stored in the credit bank. The credit bank interface will then load, presenting you with a table of your credit bank items and associated details.



### Credit Bank

Dashboard / Assets / Credit Bank

| RACS ID                     | Memo #    | Description                | Location                    | Request Date  |
|-----------------------------|-----------|----------------------------|-----------------------------|---------------|
| <a href="#">View</a> 904443 | RAIDUM321 | Removing Asset (SIN: HS... | Cicero - 8064 Brewerton Rd  | July 29, 2025 |
| <a href="#">View</a> 853675 |           | Remove Asset 'SIN: 0A8D... | SPRING - 22777 SPRING...    | July 21, 2022 |
| <a href="#">View</a> 863581 | RAIDUM321 | Removing Asset (PIN: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> 863559 | RAIDUM321 | Removing Asset (PIN: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> 904461 | RAIDUM321 | Removing Asset (PIN: NX... | Airmont - 250 Rt 59         | July 29, 2025 |
| <a href="#">View</a> 863563 | RAIDUM321 | Removing Asset (PIN: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> 904449 | RAIDUM123 | Removing Asset (PIN: NE... | Airmont - 250 Rt 59         | July 29, 2025 |

#### Credits

|          |             |
|----------|-------------|
| Approved | \$15,082.10 |
| Pending  | \$0.00      |
| Declined | \$0.00      |

#### Debits

|          |        |
|----------|--------|
| Approved | \$0.00 |
| Pending  | \$0.00 |
| Declined | \$0.00 |

#### Current Balance

|       |             |
|-------|-------------|
| Total | \$15,082.10 |
|-------|-------------|

## Understanding the Credit Bank

This section explains the purpose of the credit bank and its key functionalities.

- **Credit Tracking from Contract Changes:** The credit bank primarily functions to track credits that result from contract modifications. Specifically, it manages situations where items are removed from a contract before the contract's natural expiration date. This removal creates a credit that can be used later.
- **Applying Credits to Future Contract Additions:** The credits stored within the credit bank can be applied to add new items or services to a contract at a later time. Instead of processing a new purchase, you can utilize existing credit.
- **Use Case: Traditional vs. CXEA/Maintenance EA Contracts:** The credit bank is particularly useful in scenarios involving traditional contracts.
  - **Traditional Contracts:** These are contracts where items are added and removed individually through separate transactions.
  - **CXEA/Maintenance EA Contracts:** The credit bank is less critical when Comprehensive Experience Agreements (CXEA) or maintenance agreements are in place, as these typically handle changes differently.
- **Benefits of Using the Credit Bank:** The credit bank offers several advantages:
  - **Centralized Credit Tracking:** Provides a central location for monitoring credit creation and consumption.
  - **Prevents Credit Loss:** Helps ensure that credits are not overlooked or lost over time.
  - **Improved Financial Management:** Enables better management of financial resources associated with contract modifications.

## Navigating the Credit Bank Table

This section describes how to navigate and interact with the credit bank table.

The table displays key information related to your credits.

- **Filtering Data:** The credit bank table provides robust filtering options to help you quickly find the information you need.
  - **Quick Filters:** Use pre-defined filters to quickly narrow down the displayed data based on common criteria.
  - **Advanced Filters:** Create custom filters using multiple criteria to perform more specific searches.

**Credit Bank**  
Dashboard / Assets / Credit Bank

|                      | RACS ID | Memo #    | Description                | Location                    | Request Date  |
|----------------------|---------|-----------|----------------------------|-----------------------------|---------------|
| <a href="#">View</a> | 904443  | RAIDUM321 | Removing Asset (S/N: HS... | Cicero - 8064 Brewerton Rd  | July 29, 2025 |
| <a href="#">View</a> | 853675  |           | Remove Asset 'S/N: 0A8D... | SPRING - 22777 SPRING...    | July 21, 2022 |
| <a href="#">View</a> | 863581  | RAIDUM321 | Removing Asset (P/N: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> | 863559  | RAIDUM321 | Removing Asset (P/N: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> | 904461  | RAIDUM321 | Removing Asset (P/N: NX... | Airmont - 250 Rt 59         | July 29, 2025 |

- **Customizing Column Visibility:** You can customize the columns displayed in the table to focus on the information that is most relevant to you.
  - **Accessing Column Customization:** Click the "fields" button to open the column customization menu.
  - **Selecting Visible Columns:** Choose which columns you want to be visible in the table.

**Credit Bank**  
Dashboard / Assets / Credit Bank

|                      | RACS ID | Memo #    | Description                | Location                    | Request Date  |
|----------------------|---------|-----------|----------------------------|-----------------------------|---------------|
| <a href="#">View</a> | 904443  | RAIDUM321 | Removing Asset (S/N: HS... | Cicero - 8064 Brewerton Rd  | July 29, 2025 |
| <a href="#">View</a> | 853675  |           | Remove Asset 'S/N: 0A8D... | SPRING - 22777 SPRING...    | July 21, 2022 |
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| <a href="#">View</a> | 863559  | RAIDUM321 | Removing Asset (P/N: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> | 904461  | RAIDUM321 | Removing Asset (P/N: NX... | Airmont - 250 Rt 59         | July 29, 2025 |

**Fields**

Use this panel to control which fields are visible by adding and removing them between the visible and hidden lists.

Search

Visible

Hidden

+ RACS ID + Memo # + Description + Location + Accounting Code + Amount Iso Code + Credit Bank Type + Credit Date + Created By + Contract Asset End Date

**Credits**

Approved \$15,082.10

Pending \$0.00

Declined \$0.00

**Debits**

Approved \$0.00

Pending \$0.00

Declined \$0.00

**Current Balance**

Total \$15,082.10

- **Reorganizing Columns:** Drag and drop columns to change their order in the table display.

**Credit Bank**  
Dashboard / Assets / Credit Bank

Fields Quick Filters Advanced Filters Search

**Fields**  
Use this panel to control which fields are visible by adding and removing them between the visible and hidden lists.

Search  
Q Search

**Visible**

- RACS ID
- Memo #
- Description
- Location

**Hidden**

- Accounting Code
- Amount Iso Code
- Credit Bank Type
- Credit Date
- Created By
- Contract Asset End Date

**Request Date**

| Location | Request Date  |
|----------|---------------|
| ton Rd   | July 29, 2025 |
| RING...  | July 21, 2022 |
| ing L... | May 19, 2023  |
| ing L... | May 19, 2023  |
| ing L... | July 29, 2025 |
| ing L... | May 19, 2023  |
| ing L... | July 29, 2025 |

**Credits**

| Status   | Amount      |
|----------|-------------|
| Approved | \$15,082.10 |
| Pending  | \$0.00      |
| Declined | \$0.00      |

**Debits**

| Status   | Amount |
|----------|--------|
| Approved | \$0.00 |
| Pending  | \$0.00 |
| Declined | \$0.00 |

**Current Balance**

| Total | Amount      |
|-------|-------------|
| Total | \$15,082.10 |

- **Downloading Data:** The credit bank table supports exporting the displayed data for offline analysis or reporting.
  - Click the download button to export the entire credit bank data into a common file format (e.g., CSV, Excel).

**Credit Bank**  
Dashboard / Assets / Credit Bank

Fields Quick Filters Advanced Filters Search

**Export**

Use this panel to export the data in the table to a format of your choosing.

File Type

- ☒ Excel (XLSX) (Max 5000 rows)
- ☐ CSV

Columns

- ☐ All Fields
- ☒ Visible Fields

Cancel Export

**Table Data:**

| RACS ID | Location                    | Request Date  |
|---------|-----------------------------|---------------|
| 904443  | Cicero - 8064 Brewerton Rd  | July 29, 2025 |
| 853675  | SPRING - 22777 SPRING...    | July 21, 2022 |
| 863581  | Syracuse - 754 Morning L... | May 19, 2023  |
| 863559  | Syracuse - 754 Morning L... | May 19, 2023  |
| 904461  | Airmont - 250 Rt 59         | July 29, 2025 |
| 863563  | Syracuse - 754 Morning L... | May 19, 2023  |
| 904449  | Airmont - 250 Rt 59         | July 29, 2025 |

**Credits**

| Status   | Amount      |
|----------|-------------|
| Approved | \$15,082.10 |
| Pending  | \$0.00      |
| Declined | \$0.00      |

**Debits**

| Status   | Amount |
|----------|--------|
| Approved | \$0.00 |
| Pending  | \$0.00 |
| Declined | \$0.00 |

**Current Balance**

| Total | Amount      |
|-------|-------------|
| Total | \$15,082.10 |

- **Searching for Specific Credits:** Use the search bar to quickly locate specific credits within the credit bank.
  - Enter keywords related to the credit you are looking for, such as:
    - Description
    - Serial number
    - Other relevant details

Credit Bank

Dashboard / Assets / Credit Bank

Fields

Quick Filters

Advanced Filters

Search

|                      | RACS ID | Memo #    | Description                | Location                    | Request Date  |
|----------------------|---------|-----------|----------------------------|-----------------------------|---------------|
| <a href="#">View</a> | 904443  | RAIDUM321 | Removing Asset (S/N: HS... | Cicero - 8064 Brewerton Rd  | July 29, 2025 |
| <a href="#">View</a> | 853675  |           | Remove Asset 'S/N: 0A8D... | SPRING - 22777 SPRING...    | July 21, 2022 |
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| <a href="#">View</a> | 863559  | RAIDUM321 | Removing Asset (P/N: AS... | Syracuse - 754 Morning L... | May 19, 2023  |
| <a href="#">View</a> | 904461  | RAIDUM321 | Removing Asset (P/N: NX... | Airmont - 250 Rt 59         | July 29, 2025 |
| <a href="#">View</a> | 863563  | RAIDUM321 | Removino Asset (P/N: AS... | Syracuse - 754 Morning L... | May 19, 2023  |

Statistics

Credits

Approved

\$15,082.10

Pending

\$0.00

Declined

\$0.00

Debits

Approved

\$0.00

Pending

\$0.00

Declined

\$0.00

Current Balance