

We are currently updating our site; thank you for your patience.

## SALES

# CUSTOMERS – CREDIT LIMIT / TERMS / CHECK

Definition of Terms:

**Customer Credit Limit**<sup>1</sup> - The total limit for customer purchases.

**Credit Terms** - The customer payment terms: COD, 30 days, 60 days, 90 days, 120 days, 150 days, 180 days

**Credit Check**<sup>2</sup> - The type of check BPO does before allowing sales to the client;

- **A: Terms and Limit** - BPO will check to see whether the customer has exceeded its terms and credit limit before allowing invoicing.

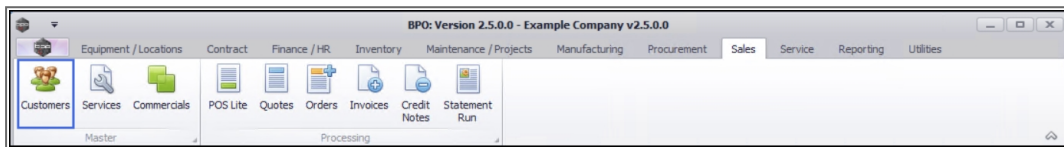
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<sup>1</sup>A credit limit is the maximum amount of credit offered to a customer. E.g. A customer has been given a credit limit of R10000, if this customer buys items or services worth R7000 from your company, their remaining credit will be R3000. Setting up a credit limit ensures that the amount of credit given to a customer is consistent with that customer's financial capacities - this tool will reduce the problem of overdue invoices and bad debt. Allowing customers to order more items/services than what they are able to pay for, is a financial risk for your company. It is important to review a customer's credit worthiness and based on that credit worthiness, establish a credit limit.

<sup>2</sup>A credit check will help determine the creditworthiness of your customer. In other words - the extent to which the customer is considered suitable to receive financial credit, often based on their reliability in paying money back in the past. There are different methods you can use: -

- **B: Limit check only** - BPO will only check to see whether the customer has exceeded its credit limit before allowing invoicing.
- **N: No check** - BPO will allow invoicing regardless of whether the customer has exceeded its terms or credit limit.

### Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located
  - The example has **Durban** selected.
3. Select the **Status** of the customer whose credit information you wish to view or edit.

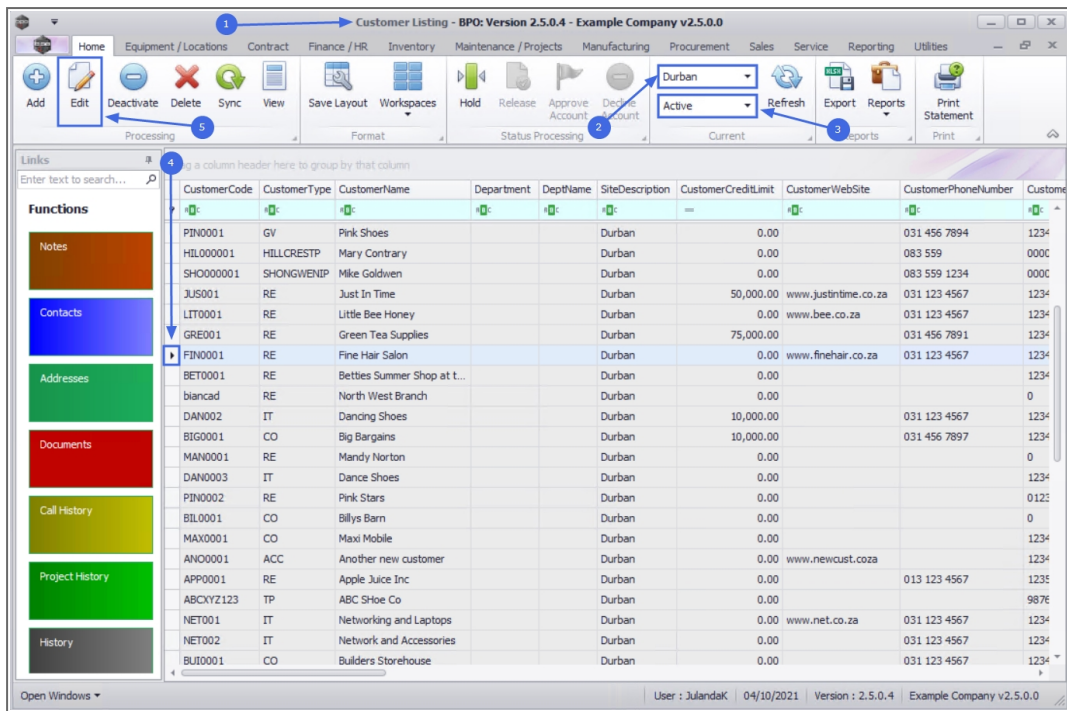


Customers credit information can be viewed in any Status and edited in all but the New-CRM and Inactive Status.

- The example has **Active** selected.
4. Select the **row** of the **customer** where you wish to **edit** the credit details.
  5. Click on **Edit**



Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



6. The **Customer Maintenance** screen will be displayed.

## VIEW/EDIT CREDIT DETAILS

Here you can view the current credit detail and edit the information, if required.

- **Credit Limit:** Type in or click on the directional **arrows** to select the correct limit.
- **Credit Check:** Click on the down **arrow** to select the credit check required.

Customer Maintenance - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Home Save Back Process

Links Enter text to search...

Functions: Notes, Contacts, Addresses, Documents, Call History, Project History, History

Detail Commercial

Type: Retail

Customer Code: FIN0001

Customer Name: Fine Hair Salon

Credit Limit: 10000

Web Site: www.finehair.co.za

Phone No.: 031 123 4567

Tax Rate: 15.00

VAT No.: 1234

Registered Name: Fine Hair Salon

Registration No.: 123456789

Holding Company: No Holding Co

Currency: South African Rand

Account Code: [Yellow Highlighted]

Credit Check: Terms and Limit

Credit Terms:

Check	Description
A	Terms and Limit
B	Limit Check Only
N	No Check

Reporting Area: [Yellow Highlighted]

Salesman: N

Account Manager: [Yellow Highlighted]

Is Debtor: [Yellow Highlighted]

Send SMS: [Yellow Highlighted]

Primary Contact: Tony Marsh

Email Address: [Yellow Highlighted]

Invoice Method: Email

Primary is Accounts Contact

Accounts Contact: Tony Marsh

Email Address: [Yellow Highlighted]

Billing Address: PO Box 1234, New Town, 3, 4, 5, 1234

Bill Postal Code: 1234

Copy Billing to Shipping

Physical Address: PO Box 1234, New Town, 3, 4, 5, 1234

Postal Code: 1234

Trading As Name: Fine Hair Salon

Shift Pattern: Normal Week

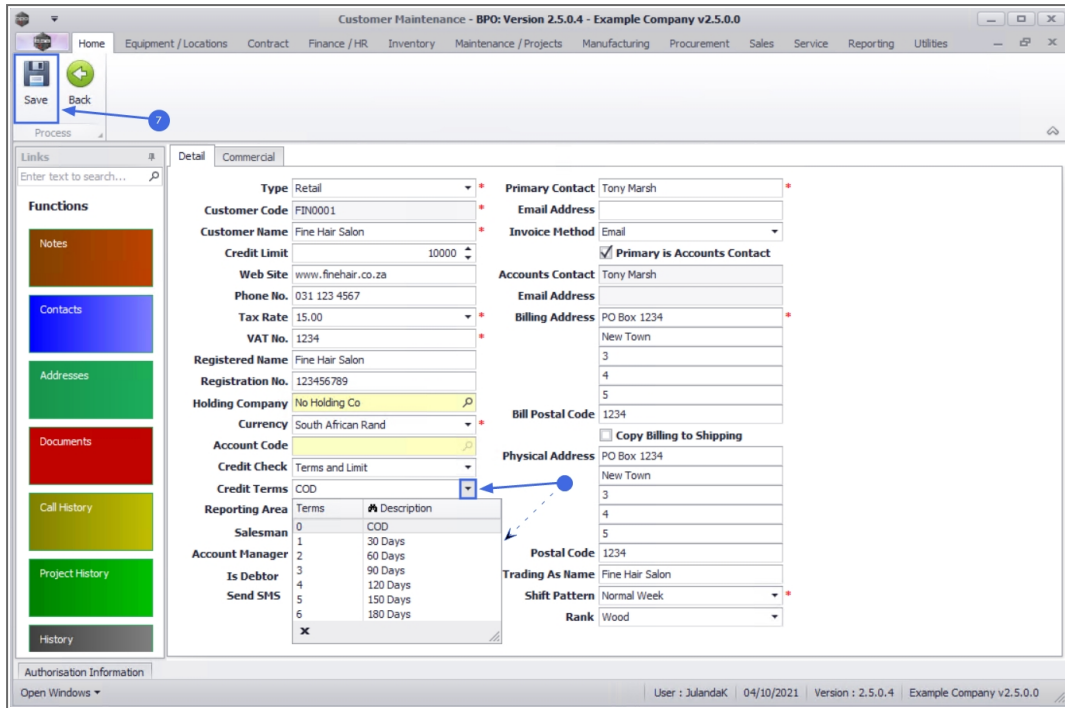
Rank: Wood

Authorisation Information: Open Windows

User: JulandaK | 04/10/2021 | Version: 2.5.0.4 | Example Company v2.5.0.0

- **Credit Terms:** Click on the down arrow to select the credit terms.

7. When you have finished updating the Credit Terms, Credit Limit and Credit Check, click on **Save**.



## VIEW UPDATED CREDIT DETAILS

- You can now view the updated credit details in the **Customer Listing** screen.

Customer Listing - BPO Version 2.5.0.4 - Example Company v2.5.0.0

Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Home Add Edit Deactivate Delete Sync View Save Layout Workspaces HMI Release Approve Account Decline Account Durban Active Refresh Export Reports Print Statement

Links Enter text to search... Drop a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	Customer
FIN0001	RE	Fine Hair Salon			Durban	10,000.00	www.finehair.co.za	031 123 4567	1234
BET0001	RE	Bettles Summer Shop at L...			Durban	0.00			1234
Isaacad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	30,000.00		031 123 4567	1234
BSG0001	CO	Big Bargains			Durban	30,000.00		031 456 7897	1234
MAN0001	RE	Handy Marton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			1234
PRN0002	RE	Pink Stars			Durban	0.00			0122
BL0001	CO	Bllys Barn			Durban	0.00			0
MAX0001	CO	Max Mobile			Durban	0.00			1234
AN00001	ACC	Another new customer			Durban	0.00	www.newcust.com		1234
APP0001	RE	Apple Juice Inc			Durban	0.00		013 123 4567	1234
ABCHYZ123	TP	ABC Shoe Co			Durban	0.00			9876
NET001	IT	Networking and Laptops			Durban	0.00	www.net.co.za	031 123 4567	1234
NET002	IT	Network and Accessories			Durban	0.00		031 123 4567	1234
BL00001	CO	Builders Storehouse			Durban	0.00		031 123 4567	1234
TED0001	RE	Ted Mosby Designs			Durban	0.00		031 123 4567	1234
COM0001	GV	Community Specs			Durban	0.00		031 123 4567	1234
HEAD001	IT	Healing Hands			Durban	0.00			4532
STA001	LEG	Stan and Lopez			Durban	30,000.00		031 123 4567	1234
BEA001	LEG	Bearing and Shoe			Durban	80,000.00		031 123 4567	9876
BT0001	IT	Bits and Bytes			Durban	12,000.00		031 123 4567	1234

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