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

SALES

CUSTOMERS - CREDIT LIMIT / TERMS / CHECK

Definition of Terms:

Customer Credit Limit[1] - 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[2] - 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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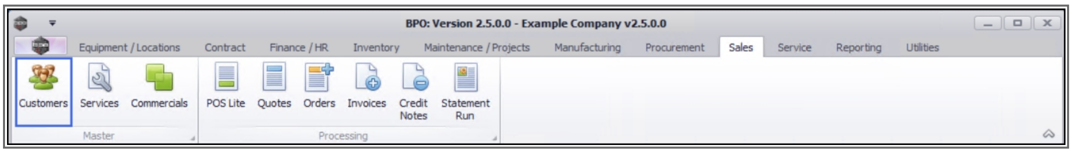
[1] A credit limit is the maximum amount of credit offered to a customer. E.g. A customer has been given a credit limit of R10000, if this customer buys items or services worth R7000 from your company, their remaining credit will be R3000. Setting up a credit limit ensures that the amount of credit given 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.
[2] 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

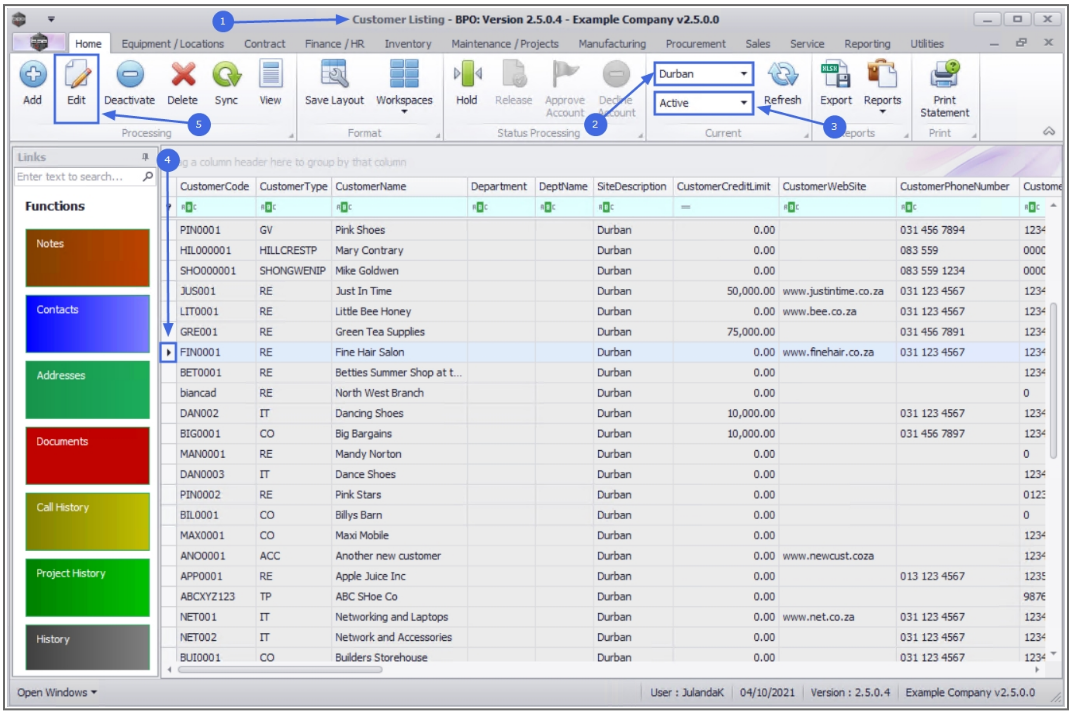


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located
    - The example has **Durban** selected.
3. Select the **Status** of the customer whose credit information you wish to view or edit.

> 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**.

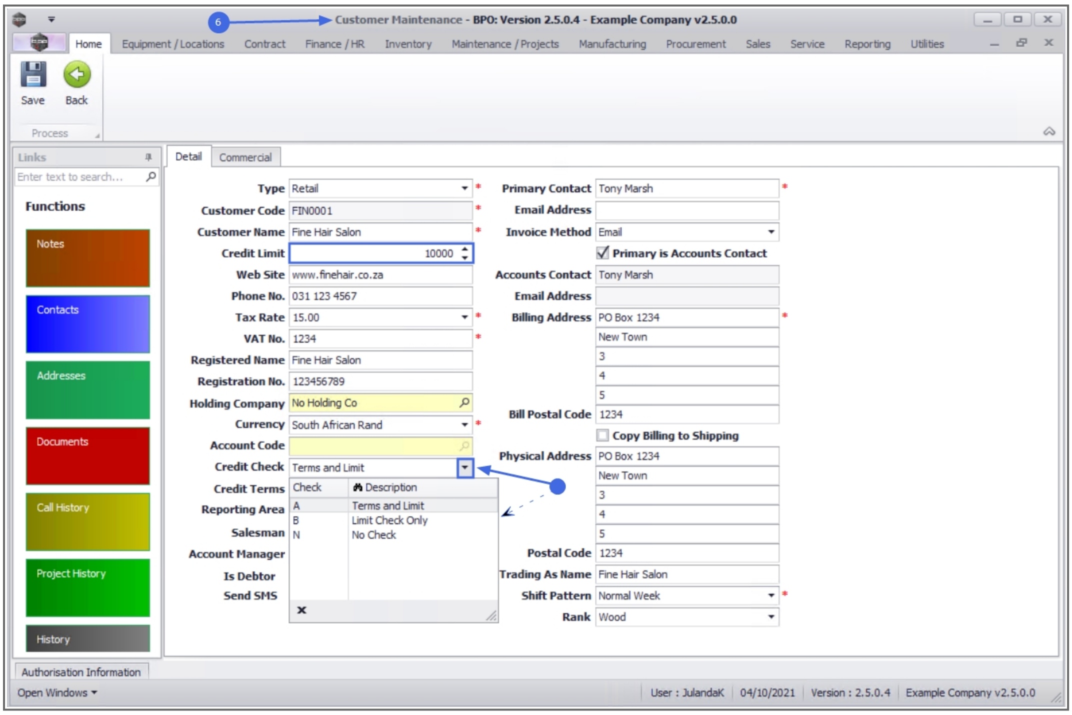


6. The **Customer Maintenance** screen will be displayed.

VIEW/EDIT CREDIT DETAILS

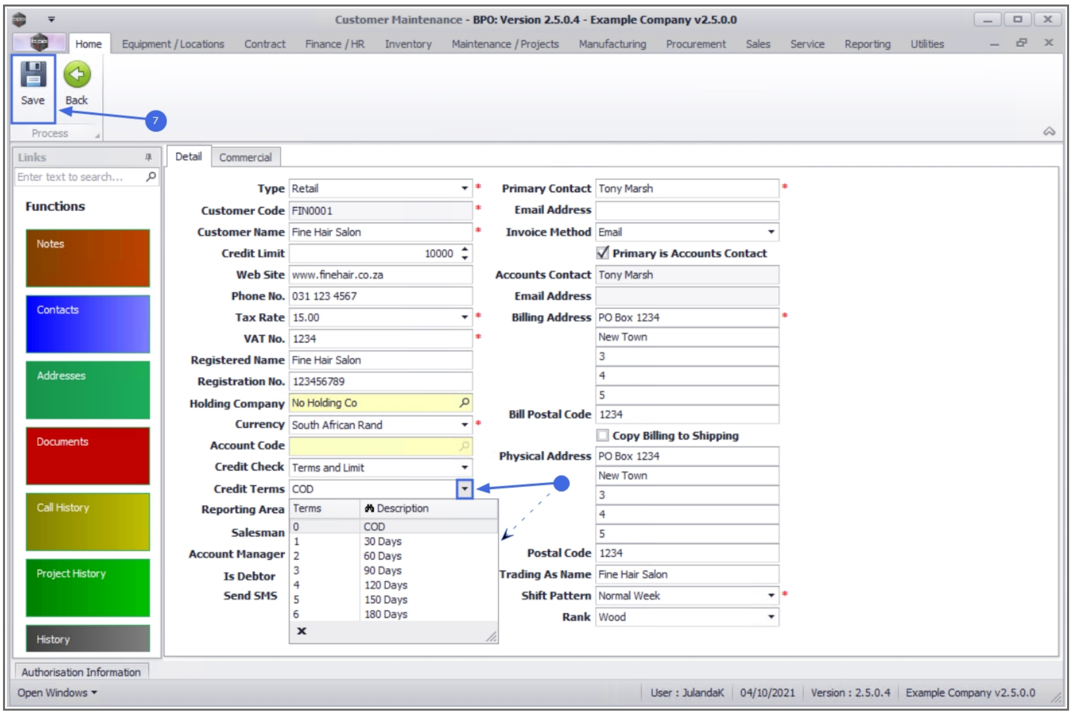
Here you can view the current credit detail and edit the information, if required.

- **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.



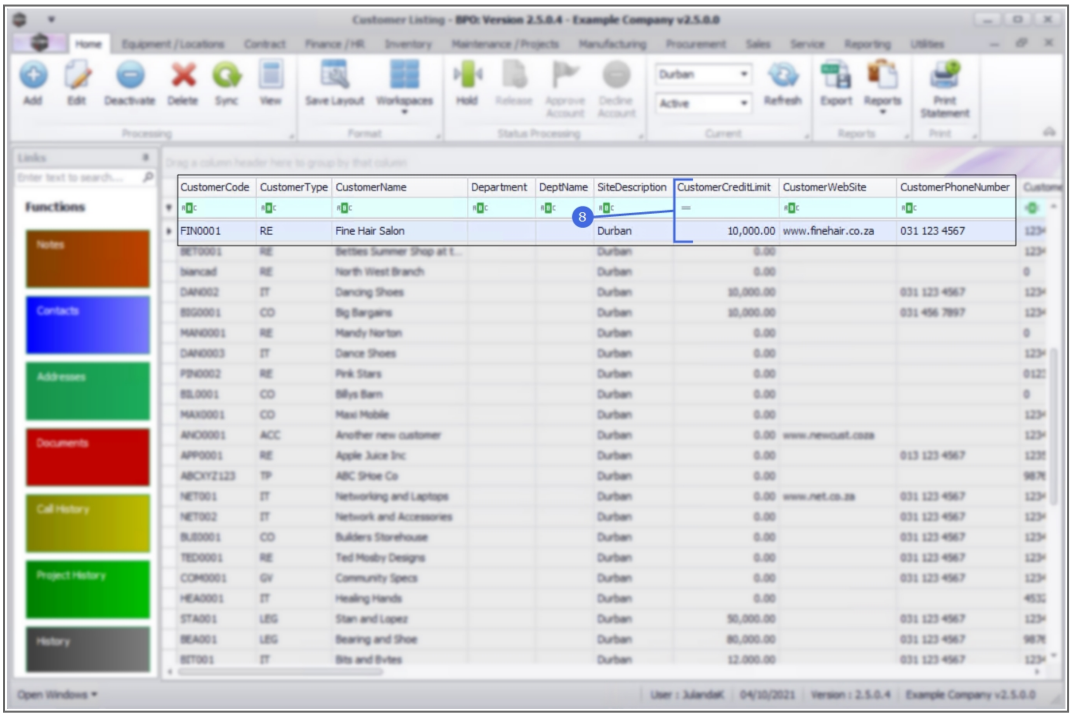
- **Credit Terms:** Click on the down **arrow** to select the credit terms.

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



VIEW UPDATED CREDIT DETAILS

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


CustomerCode
CustomerType
CustomerName
Department
DeptName
SiteDescription
CustomerCreditLimit
CustomerWebSite
CustomerPhoneNumber
8
FIN0001
RE
Fine Hair Salon
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10,000.00
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