Using Credit Controls

Offering customer's credit requires consistent management of balances and activity. BisTrack can assist you with the monitoring process. In this course we will explore setting a customer's credit limit and using the hold status. We also will walk through the procedure to obtain a credit release code and how to utilize credit control messages. Finally, we'll take a look at locating orders on the credit control screen.

We will start by viewing any credit limits or on Holds that a customer may have. Begin by opening the customer page. Type the name of the customer in the Find box and press Go. Once you have located the customer, right click their name and select Properties.

On the General tab, you can choose to put the customer's Account on hold. To do this, simply check the box. A red x with the phrase Account on Hold will appear in the blue bar of the customers screen.

When a customer's account in on hold, the only type of order that can be entered for them is a cash sale. To remove the hold, click the box again. Now select the Accounts tab. Here you can establish your customer's credit limit. The user changing the credit limit must have a "Maximum credit limit" amount as high as or higher than the credit limit amount being set on the customer. Press Save and Close to save the changes.

When a customer's order puts them over their credit limit the following Credit Control Warning message is shown. The person entering the order can request an immediate release code from the Credit Controller by providing the credit controller information about the customer and order requesting release and then providing the Order code.

Once the credit controller has determined that the order can be released, the credit controller will open the Sales tab and then select Get Credit Control Release Code. Enter the Order Code that the person entering the order has provided. Click Get Release Code. A unique release code will appear in the box. Relay this code back to the employee creating the order. They will enter it in the Release code box and press OK. When the code is accepted they will be able to complete the order.

When the sales person completes the sale without a release code, the order's status is Credit Control Awaiting Release. When this happens, the Credit Controller will receive a message about the sale. From the Views pane the controller will select My Messages. Then, double click the relevant Credit Hold Message. Included in the message are the details of the order and a Balance Summary of the customer's account. The buttons at the bottom of the window provide additional options for opening the customer properties, opening the order or to forward this message to another person.

From the Credit Control button, you can choose to Release the order, change its sub status from Awaiting Release to In Progress, or Fail. For this example we will release the order. When asked if you are sure, select yes. Press Close to close the message. At this point a message will be sent to the person who took the order, informing them that it has been released.

To find an order on credit control, start by opening the Find Work folder from the Views pane. Then select Sales Orders for Credit Control. Press Enter to list all sales orders on credit control or type the document number in the search box and press Go. Highlight the document and then right-click. Select Credit Control. You can now choose to release the order, mark the credit control issue as in progress or fail order.

Using Credit controls allows you to best manage your customer's credit. This course showed you the process for putting a customer's account on hold and changing their credit limit. You looked at the process for getting credit control release codes if needed. You should also understand how to find an order on credit control and change its status from both the find work page and my messages.

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