

Credit Request Sign-Off Process

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Once you have setup your employees, User Group Credit Memo limits and User Group Security options, you may begin using Credit Requests. This section describes the flow of a Credit Request from the creation of a Credit Request to the final generation of the Credit Memo on the customer's account. In the example provided, we are using a three-step sign-off process using a Credit Template. The other methods of creating Credit Requests will be discussed later in this document under the title of Creating Credit Requests (refer to the Table of Contents for the starting page number of this section).

Create a Credit Request & First Sign-Off

In the screen shot below, a Credit Request was created using a Credit Template by the lowest approval level User Olive. Olive's User Group Security only allows her to approve a Credit Request for up to \$50.00. Since the Credit Request amount is for \$68.90, when Olive clicked the Sign-Off 1 button, the amount defaulted to her maximum Credit Memo approval amount, which is \$50.00. The next employee to whom the Credit Request is assigned may accept, increase, or decrease the approved amount of the original requested amount.

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Credit Request Second Sign-off

The next person to sign-off on the Credit Request is Maggie. Maggie's User Group Security allows her to approve a Credit Request for up to \$100.00. When Maggie clicks the Sign-off 2 button, the approved amount changes to \$68.90, which was the original requested amount. Maggie may save the Credit Request with the defaulted approval amount or may edit the Credit Template for an amount up to \$100.00.

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Credit Request Third Sign-off

The last person to sign-off on the Credit Request is Carolyn Jackson. Carolyn's User Group Security allows her to approve a Credit Request for up to \$1,000,000.00 and she also has permissions to create Credit Memos. Once the sign-off 3 button is clicked, the final approval amount is filled in. The last step is to click the Save button to create and post the Credit Memo.

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