

Credit Request Planning

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Before activating and using Credit Requests, it must first be determined which Users will be allowed to create Credit Requests, which Users will be able to approve Credit Requests and a maximum dollar amount that the User Group is allowed to approve for each Credit Request. Each User is linked to one or more User Groups; make certain the User Groups that you assign a credit limit will apply to the Users you want to grant these new permissions. You may have to re-design your User Group Security to accommodate Credit Request processing. Your company may create new User Groups for the Credit Request Processing and assign the Users involved in the process to the appropriate User Group.

Before creating the employee setups for Credit Requests, it must first be determined how Credit Requests will flow within your organization. You need to ask yourself the questions, who will be the first, second and third person to sign-off on the requests. And further, will certain individuals be able to create the Credit Memo without moving to the next level of sign-off. Once company rules have been established, proceed to the setup steps. It is not required to use all three levels of sign-off; your company may have one or two sign-off levels only.

The sign-off flow of the Credit Request is determined by the setup in SedonaSetup *Employee* setup table. The field labeled *Supervisor and Credit Request Handoff* controls which employee the Credit Request will be assigned to. The employee record must be linked to an active User record found in the User setup table.

The User Group assigned to the User, controls fields for Credit Request dollar limits and controls other security options associated with Credit Request. The User Group field *Credit Memo Limit* is where you are able to set the maximum dollar amount limit for a User assigned to a User Group. The User will not be able to sign-off a Credit Request for an amount over their User Group *Credit Memo Limit* amount. Users participating in the Credit Request process do not have to have a Credit Memo Limit assigned to their User Group. If the User Group is not assigned a Credit Memo Limit, they may enter a Credit Request but not be able to approve the Credit Request for the amount requested; the Credit Request would need to be approved by a User with the appropriate Credit Memo Limit.

To begin the setup process, the Credit Requests function must first be activated in SedonaSetup. Follow the links below for instructions on how to activate this function.