

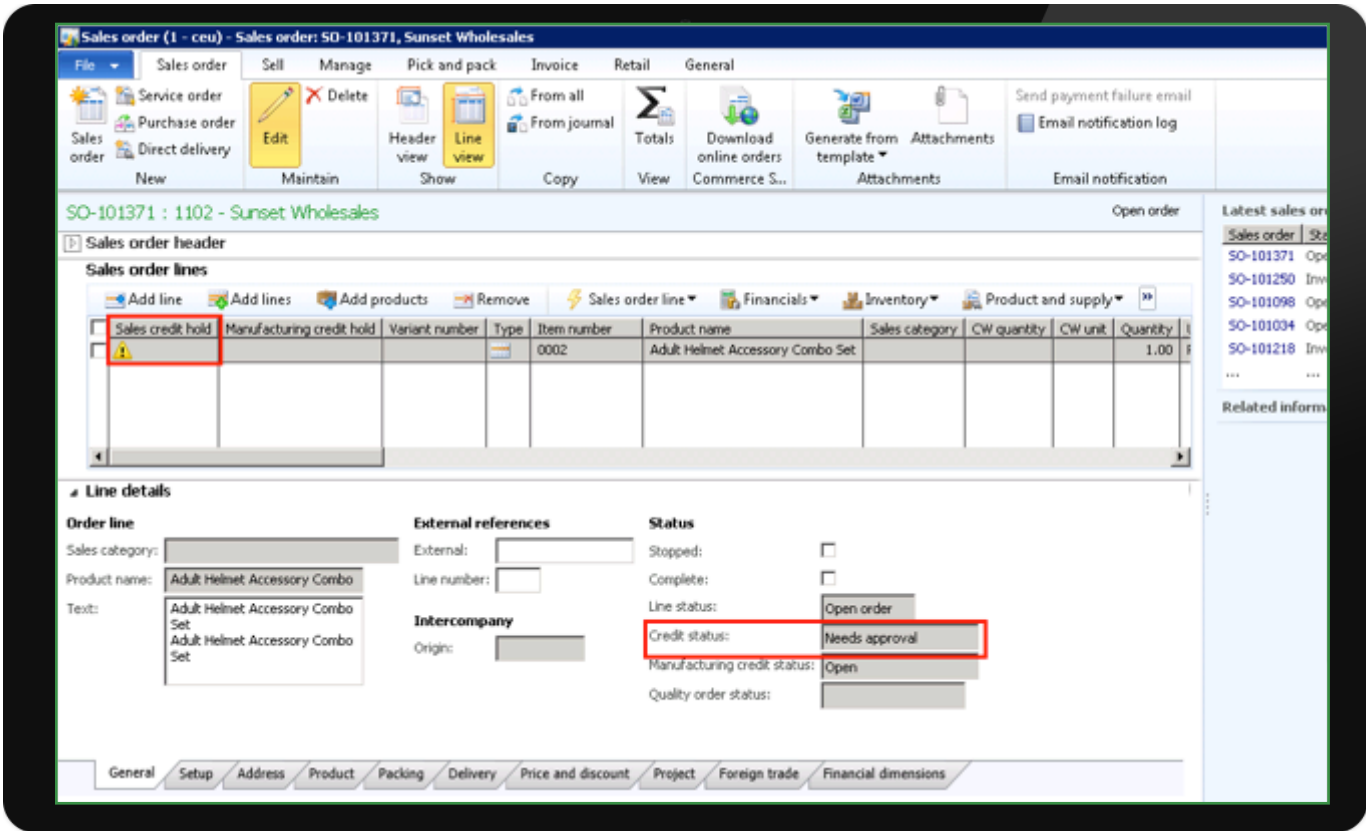


## Protect Profits with the Velosio Credit Management Module

Slow paying clients cause an organization major issues. Best practice credit control management ensures the business maximizes profit. The Velosio Credit Management module is a powerful credit management solution providing advanced features to enable credit managers to reduce bad debts and improve cash flow. Built in Microsoft Dynamics AX 2012 R3 and integrated with accounts receivable, sales orders and consolidated picking functionality, the Velosio Credit Management Module provides credit managers with the ability to hold customer orders until credit problems have been resolved.

### Key Features Include:

- Allows the finance department to set credit limits for customers at the order through Enterprise Portal.
- Past due tolerance amounts can be setup along with an aging action to take automatic suitable actions for customers having credit issues, such as hold shipments, send alert to credit manager, or stop new orders from being created.
- Customer's credit related information, which is required to resolve credit issues, is presented on a single credit approval screen for the credit manager.
- Orders can be put in a pending state for credit managers to follow up orders with credit issues on a later date.
- Credit managers can also approve orders partially. Individual lines of sales orders can be approved and allowed to be processed further.
- The credit management module is integrated with the consolidated picking functionality so that sales orders are not activated for customers who have credit issues.



Sales Order Details Page

- Buffer conditions can be set to manage credit levels.
- Global credit management parameters can be set, such as sales credit limit type, check credit at picking, check credit at packing, check credit at invoicing.
- Credit regions and managers are created and used to classify/group customers. These credit regions are associated to the customers in the customer master.

- Delegates can be set for credit managers so that the delegated manager can take actions in the absence of the credit manager. Start and end dates for delegation can also be set for more control.
- The Velosio Credit Management module provides all the additional capabilities which a credit manager needs to deal with credit issues effectively.

Velosio is a new leader in cloud, that simplifies *your* journey to NEXT. We guide you, deploying best-fit business applications that keep you ahead of the competition in today's digital-first business environment. We balance visionary ideas with pragmatism, delivering an exceptional client experience that drives business value faster. [www.velosio.com](http://www.velosio.com)