



NAV-X CREDIT MANAGEMENT

MANAGING LIMITS AND EXCEPTIONS

EASY. AUTOMATED. FLEXIBLE.

- ✓ Integrated within the Order processing. Information shown directly below sales lines.
- ✓ Three credit limits: Over the limit, Past due, and Over the limit and Past due
- ✓ Flexible credit management tolerances based on number of days or a or percentage
- ✓ Customers can be set to "bypass" credit management
- ✓ Credit Manager is a user set-up that allows for a person or group of people to have the ability to review and release orders on credit hold.
- ✓ Flexible - Modify workflows and notifications sent to credit manager(s)
- ✓ Flexible - Have the ability to set-up Customers with No limit, Infinite limit, and also the ability to "bypass" credit management by Customer
- ✓ Automated - workflows and auto-approval assists a Credit manager with daily activities including alerting them of Customers who have made a recent payment
- ✓ Compatible with NAV 2013 R2, 2015, 2016, 2017

HOW TO BUY?

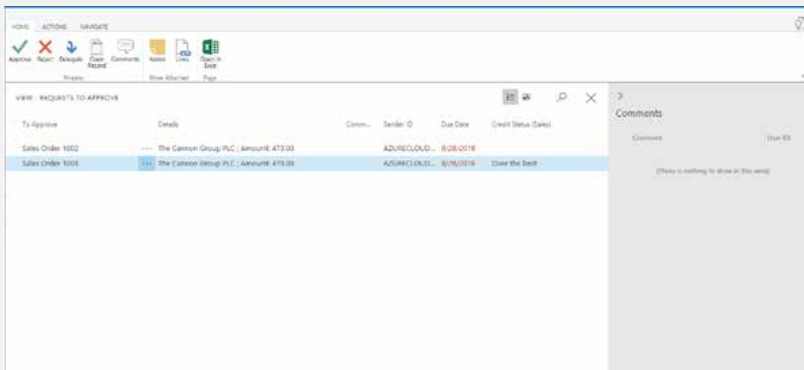
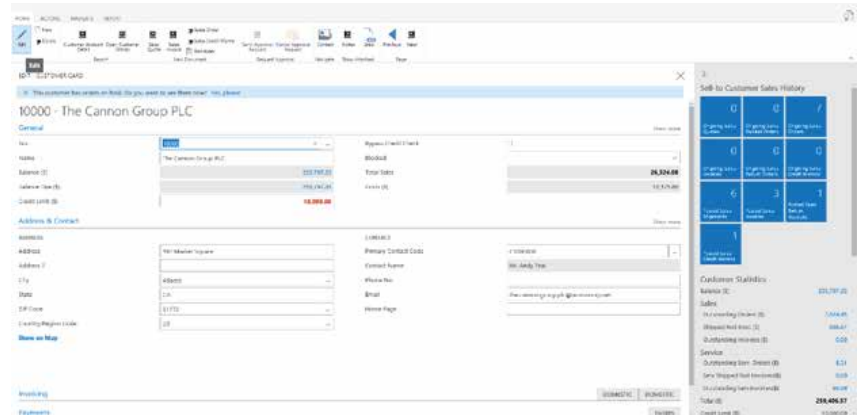
NAV-X Credit Management can be downloaded directly from Microsoft AppSource.

Do you have customers with overdue balances or customers who exceed their credit limit and you still ship orders to them? Do you spend time trying to determine, if you should still ship an order, although the credit limit is exceeded? Do you think that the standard warning message when entering an order is not enough or is interrupting the order entry?

Once your order is entered and you release the order, the credit limit will be validated against open and shipped orders and you will see one warning that the customer exceeded the credit limit or has past due invoices. Then the order will be placed on credit hold and your credit approver will receive a notification that the order needs to be reviewed and approved. If the order is approved, it is automatically released and can be further processed.

You can decide, if you want to define a credit limit of "0" to mean that the customer has infinite credit or no credit.

Tolerances can be built in so that an order will not be placed on hold, just because the credit limit it exceeded by one cent or the customer is one day late on their payment.



The workflow used to alert an approver about an order for review can be customized to your unique requirements.

ABOUT NAV-X LLC

NAV-X, with its roots deep in the rich history of Microsoft Dynamics NAV in the North American market, is a publisher of functionality commonly required by distribution and manufacturing businesses, but unavailable in native NAV. Since 1996, our team has been developing this functionality and built a codex of Best Practice solutions. These solutions provide our partners and their clients with reliable and repeatable competitive advantages.

CONTACT INFORMATION

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HOME ACTING TARGET

Approve Reject Details Case Record Comments Notes Links Open in Excel

VIEW - REQUESTS TO APPROVE

To Approve	Details	Comm...	Sender ID	Due Date	Credit Status (Sales)
Sales Order 1002	--- The Cannon Group PLC ; Amount: 473.00		AZURECLOUD...	8/08/2018	
Sales Order 1001	--- The Cannon Group PLC ; Amount: 473.00		AZURECLOUD...	8/06/2018	Over the limit

Comments

Comment [Post]

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The workflow used to alert an approver about an order for review can be customized to your unique requirements.

HOME ACTIONS NAVIGATE

Approve Reject Dispatch Case Record Comments Notes Links Open in Excel

VIEW: REQUESTS TO APPROVE

To Approve	Details	Comm...	Sender ID	Due Date	Credit Status (Sales)
Sales Order 1002	--- The Cannon Group PLC ; Amount: 473.00		AZURECLOUD...	8/08/2018	
Sales Order 1006	--- The Cannon Group PLC ; Amount: 473.00		AZURECLOUD...	8/06/2018	Over the Best

Comments

Comment Over Edit

(There is nothing to show in this view)

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