CREDIT MANAGEMENT

NAVX

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

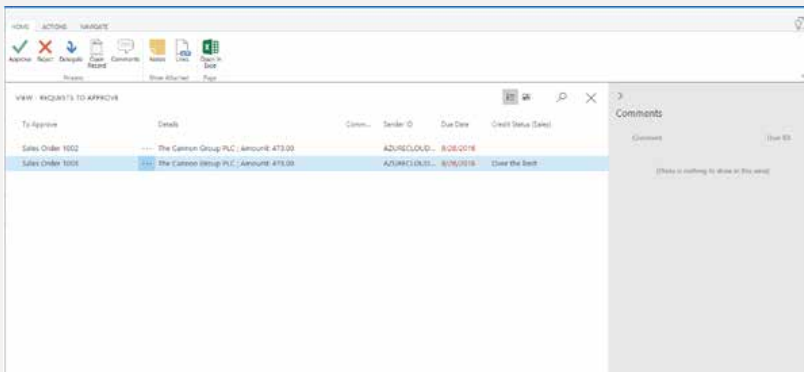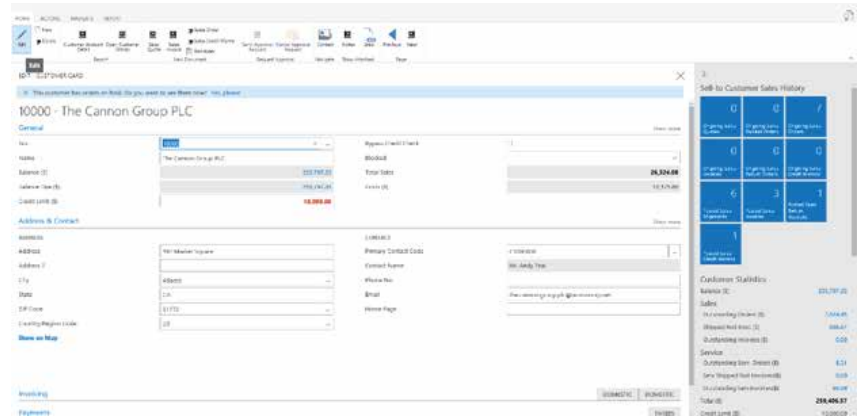- ✅ Compatible with NAV 2013 R2, 2015, 2016, 2017

HOW TO BUY?

NAV-X Credit Management can be added to your Client's license by adding the granule in Partner Source.

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

NAV-X LLC
Building 4 – 2nd Floor
Holmdel, NJ 07733

Phone: +1 (877) 779-6289
Email: info@nav-x.com
www.nav-x.com

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

ABOUT NAV-X LLC