



Credit Approval

SOP 122

Revision B, 10/11/2018

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PURPOSE:

The accounting department will review order on credit hold to determine if the orders should be released. There are two ways to do this in Deacom. First is reviewing each order. Second is using the Credit report in sales order management. Both options are explained in this document.

PROCESS STEPS:

Order Review:

1. Navigate to Sales > Order Reporting
2. Change the Order Type to "Credit Hold"
3. Click View
4. Highlight order you want to release
5. Click Modify
6. Change Order Type to "Sales Order"

Note: The **CSR/Salesman** will **notify** about the **"Cross-facility" credit hold** to be saved correctly. (i.e., "Cross-facility" sales orders will need Facility & Invoicing Facility verified.)

- a. If you need to extend credit or days
 - i. Click on the Bill-To Company magnifying glass
 - ii. Click Modify
 - iii. Navigate to Credit tab
 - iv. Change the limit
 - v. Click Save and Exit the "Edit Bill-To Company" screen
7. Click the Bill-To again
8. Click Save

Credit Report:

1. Navigate to Sales > Sales Order Management
2. Change the Report Type to Credit
3. Click View
4. Highlight the order to be approved
5. Double click - this will change the Selected field to "Yes".
6. Click Approve

Note: If the customer is over the never exceeds limits, you will need to change the limits before you can approve.

REVISIONS

Rev	Date	Change
I/R	10/23/17	New
A	3/20/18	Button names.
B	10/11/18	Add note for CSR(Et al.) to notify AR for "Cross-facility" verify.