



# AXTEND Credit

## AXTEND Credit management

# THOROUGHLY MANAGE YOUR CUSTOMERS' CREDIT



Customer credit management has many elements. Credit managers often find themselves being part collections agent, part customer service rep, and part sales manager, all in an effort to process only those sales orders that do not exceed the company's tolerance for risk.

**AXTEND Credit** management extends the functionality of Dynamics 365 for Operations by introducing rules and gates in the Sales Order process. The rules control a credit calculation engine that determine if orders should be released or placed on credit hold.

### The credit calculation engine includes:

- Temporary and permanent credit limit.
- Excluding sales orders with configured payment codes.
- Assign rules at customer or company level.
- Setup limit for bypassing, either by amount or percentage.
- Days expiring order release.
- Automatically stopping infrequent customer orders and past due.
- Configure when and where orders are evaluated.

Gates where **AXTEND Credit** can intersect with the standard sales order and production processes are: when entering order, confirming, picking, packing, invoicing and at production start.



AXNORTH