Trade Series

Scalable Data Systems

- Commodity
- Logistics & Transport
- Landed Cost
- **Advanced Credit**

Improve cashflow by reducing associated costs through efficient credit and claim management.

Scalable's Advanced Credit Management for Microsoft Dynamics 365 Finance and Operations enables businesses to assess their trading terms and credit risks continuously. The module supports credit control rules to identify breaches of trading terms immediately and resolve claims quickly, ensuring:

- better cashflow management
- reduced customer credit risk
- fast resolution of claims and improved claim management.

Reduced customer credit risk

Scalable's Advanced Credit Management builds on the Microsoft Dynamics 365 Finance and Operations Accounts Receivable module to automate the credit control rules and authorizations.

Advanced Credit Management extends the 'warning' dates system to a 'hold', alerting point-of-sale and distribution staff immediately if credit limits or trading days are exceeded.

Personnel can be assigned to authority levels for releasing goods even if a sales order breaches credit rules, ensuring strict credit management doesn't come at the cost of good customer relations. This system is supported by an in-built messaging function, alerting authorised personnel by email (optionally by selected SMS or social media alert) when a sales order is in breach.

Faster resolution of claims

Advanced Credit Management gives businesses confidence that all invoices remaining on the accounts receivable ledger are collectable, ensuring faster collection of outstanding balances and improving cashflow.

In organizations with high sales volumes and customer credit claims, credit collection can be time-consuming and costly.

Typically, when a customer has a claim, the invoice is short-paid pending a credit note. This often results in multiple invoices with open balances displaying on customer accounts. The credit collection team wastes a lot of time sorting the chaff from the wheat.

Advanced Credit Management solves this by marking and temporarily settling any invoice which has a claim, leaving only truly collectable, open invoices visible. Marked invoices are easily identified to be approved and closed or transferred back to the accounts receivable ledger for collection and settlement.

Key features

- Greater administrative control over collections and claims
- Cost saving due to simpler and faster collection and claims processes
- Risk minimisation, as sales orders can be automatically put on hold status if:
  - Credit limit exceeded
  - Trading days exceeded
- Different parameters to restrict sales, deliveries and transport loads
- Ability to 'release' orders for shipment is simply managed by authorised user groups who can be alerted via email, optionally SMS and social media messaging
- Full Sales Orders and Accounts Receivable integration
- Combined credit limits if customers belong to corporate group of companies

Microsoft Gold Partner

Microsoft Dynamics 365
CERTIFIED