

Credit Approval Setup

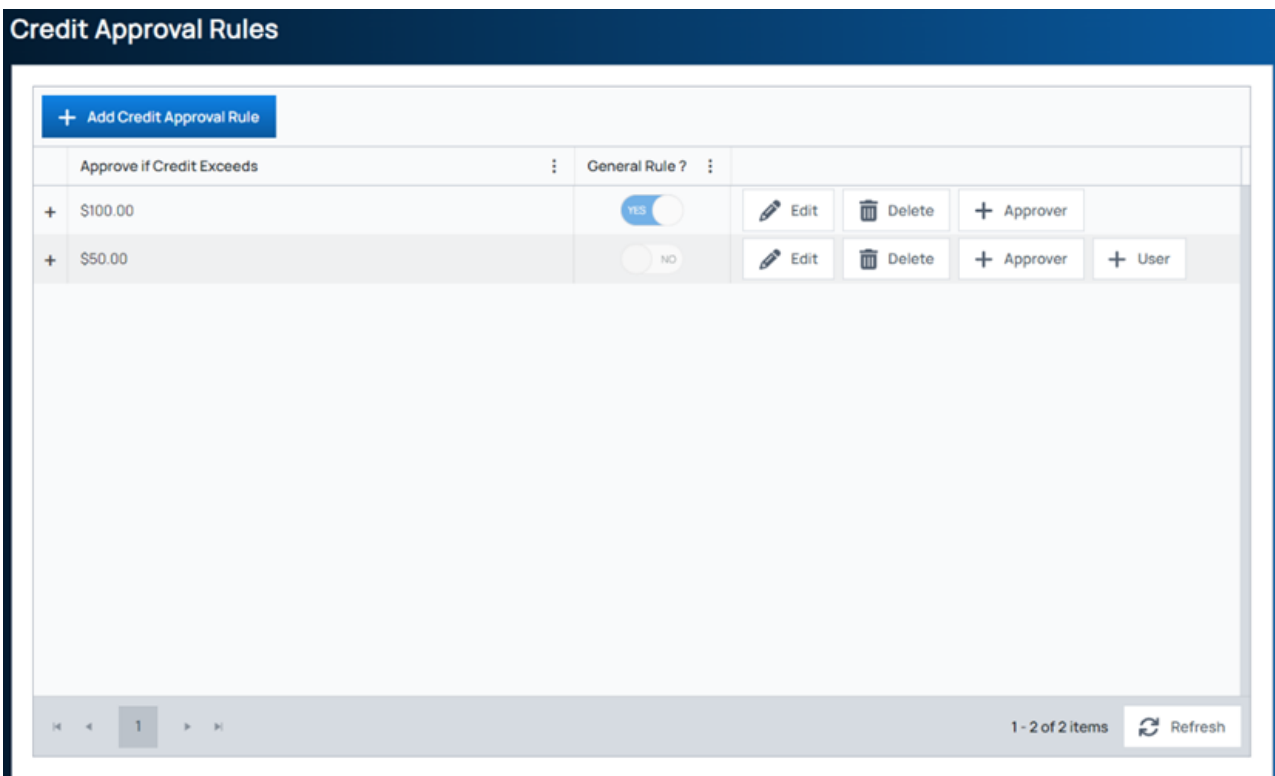
Last Modified on 09/07/2023 4:13 pm EDT

There is a setup feature for credit approval rules. (Setup > Operations > Credit Approval Rules) Use this to define the credit approval process and to specify the parameters that determine whether a credit needs to be approved and to whom the parameters apply. Users with the Administrator role can add and change credit approval rules and add and delete approvers and users on the rules.

These credit approval rules apply when issuing credit to customers.

Approval Rule Setup

Open the Credit Approval Rules page. (Setup > Operations > Credit Approval Rules)



Click + Add Credit Approval Rule. This opens the Add Credit Rule form.

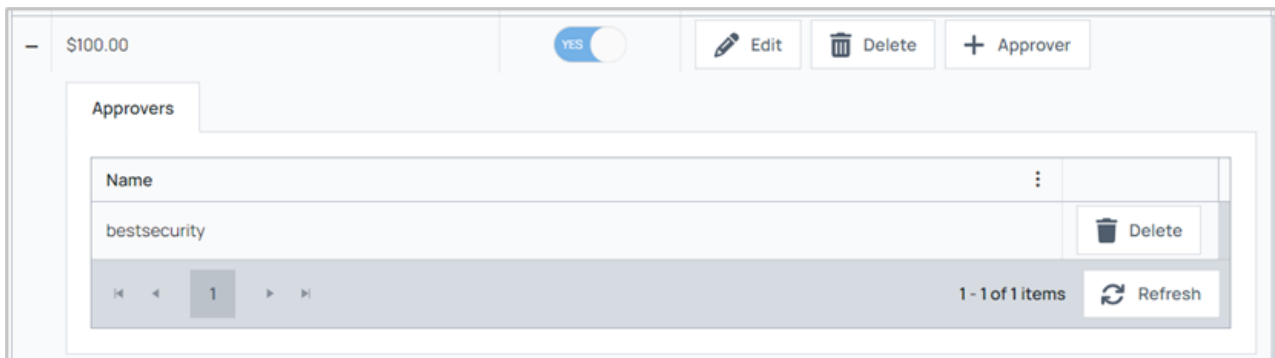
The screenshot shows the 'Add Credit Rule' form. It has a blue header with the title 'Add Credit Rule' and a close button. The form contains two fields: 'Credit Exceeds' with a text input field containing '\$0.00' and a dropdown arrow, and 'General Rule?' with a toggle switch currently set to 'YES'. At the bottom, there are two buttons: a green 'Save' button and a white 'Cancel' button.

Enter an amount for the Credit Exceeds. Approval is required for an amount over this.

Select if this is a General Rule. The default is Yes. General rules apply to all users. If this is not a general rule, select users to whom the rule applies.

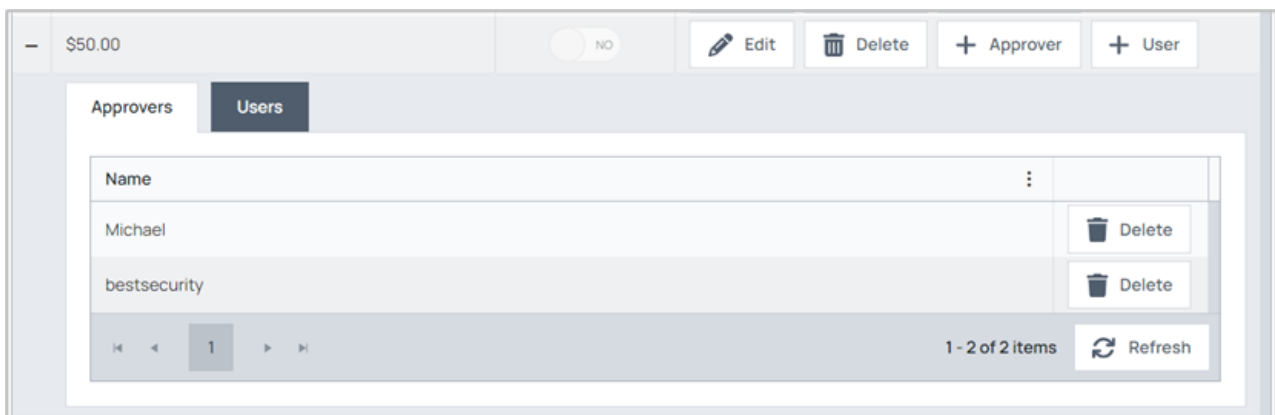
In the grid in the row for the rule, click the + Approver button. This opens a list of Managely users. Select the checkbox beside users who should be allowed to approve the credit. (Note: If you do not select any approvers, the credit cannot be approved.) Click + Add User.

In the grid, expand the general rule to see the approvers.



If the credit approval rule is not a general rule, there is a + Users button in the row. Click the + Users button. This opens a list of Managely users. Select the checkbox beside any users this rule applies to. Click + Add User.

In the grid, expand the non-general rule to see the approvers and users.



The Approvers tab shows who can approve the credit.

The Users tab shows which users the rule applies to.