

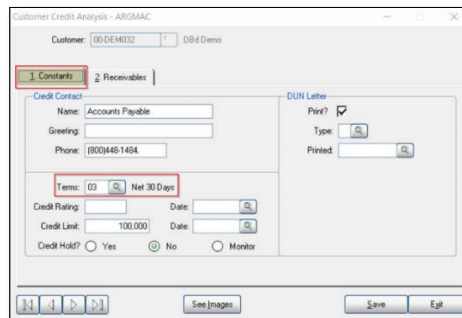
Customers - Credit Analysis

This menu selection contains credit settings, contact information for statements and DUN letter settings. DUN functions not covered in this course.

1. Constants tab

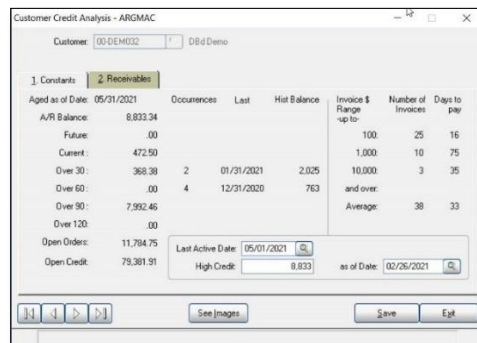
These fields are related to various A/R and O/E functions.

1. **Name, Greeting, and Phone** used with A/R Statements.
2. **Terms:** *Required field. Select from list of available terms.
3. **Credit Rating:** 1-100 as defined by you / **Date:** date the rating given.
4. **Credit Limit:** displays if client's open balance too high/ **Date:** date the limit given.
5. **Credit Hold** – the credit hold
 - a. Yes – prevents orders from being entered.
 - b. No – no restrictions
 - c. Monitor – displays the credit screen during order entry.



2. Receivables tab

This tab displays the current A/R status in dollar values.



The A/R Balance and Open Orders are updated when an order is entered and during the update process.

The Aging fields are updated via the Aging Open Invoice report with the last date ran reflected in the **as of date:** field.

For questions, contact service@demandbridge.com.