

Credit Management

Sales Order Credit Management

SALES ORDER CREDIT MANAGEMENT SO CREDIT HOLD LIST SO CREDIT HOLD APPROVAL LIST

10 ▾ CREATE REQUEST REFRESH LIST

<input type="checkbox"/>	SALES ORDER NO	Project Code	Unit Code	CUSTOMER CODE	CUSTOMER NAME	SO DATE	ORDER VALUE	SO LINE DETAILS	STATUS	ACTIONS
<input type="checkbox"/>	SO326477	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-22	21,220	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326453	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	1,403	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326452	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	144	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326451	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	21,320	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326447	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,330	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326446	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,300	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326445	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,000	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326443	MRO	SBRD01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	252	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326432	MRO	SAHM01	ECUS0039	ECUS0039	2023-08-07	277,356	SHOW LINES	CREDITHOLD	👁
<input type="checkbox"/>	SO326428	MRO	SPUN01	CUS03975	POSCO MAHARASHTRA STEEL PVT	2023-08-04	217,017	SHOW LINES	CREDITHOLD	👁

< 1 2 3 ... 17 >

- It shows different Sales orders.

Sales Orders on Hold

SALES ORDER CREDIT MANAGEMENT SO CREDIT HOLD LIST SO CREDIT HOLD APPROVAL LIST

10 ▾ CREATE REQUEST REFRESH LIST

<input checked="" type="checkbox"/>	SALES ORDER NO	Project Code	Unit Code	CUSTOMER CODE	CUSTOMER NAME	SO DATE	ORDER VALUE	SO LINE DETAILS	STATUS	ACTIONS
<input checked="" type="checkbox"/>	SO326477	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-22	21,220	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326453	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	1,403	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326452	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	144	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326451	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-16	21,320	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326447	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,330	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326446	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,300	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326445	MRO	SPUN01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	1,000	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO326443	MRO	SBRD01	CUS09618	CSE SOLUTIONS PVT. LTD.	2023-08-14	252	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO296334	Schneide	SAHM01	CUS09618	CSE SOLUTIONS PVT. LTD.	2022-07-26	120,000	SHOW LINES	CREDITHOLD	👁
<input checked="" type="checkbox"/>	SO291696	Rockwell	SBRD01	CUS09618	CSE SOLUTIONS PVT. LTD.	2022-05-03	100,850	SHOW LINES	CREDITHOLD	👁

< 1 2 >

1. Select 'SO Credit Hold List'. It displays sales orders on hold.
2. Sales orders having same customer name are selected.
3. Click on 'Create Request'.

Create SO Credit Request

CREATE SO CREDIT REQUEST

SO CREDIT REQUEST NUMBER **1** TOTAL INVOICE VALUE **2**

SO CREDIT REQ REASON **3**

CANCEL **4**

1. Request number is auto generated.
2. Total invoice value is displayed.
3. Enter request reason.
4. Save the request.

Approve Request

SALES ORDER CREDIT MANAGEMENT SO CREDIT HOLD LIST **SO CREDIT HOLD APPROVAL LIST** **1**

REQUEST NO	CUSTOMER CODE	CUSTOMER NAME	SO LIST	APPROVAL PROCESS	STATUS
SO-CR000056	CUS09618	CSE SOLUTIONS PVT. LTD.	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/> 2
SO-CR000056	CUS09618	CSE SOLUTIONS PVT. LTD.	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000056	CUS09618	CSE SOLUTIONS PVT. LTD.	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000056	CUS09618	CSE SOLUTIONS PVT. LTD.	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000049	CUS00002	3A INDUSTRIAL AUTOMATION	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000049	CUS00002	3A INDUSTRIAL AUTOMATION	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000047	CUS02113	SFC ENVIRONMENTAL TECHNOLOGI	<input type="button" value="SO LIST"/>	<input checked="" type="button" value="RECYCLE"/> <input checked="" type="button" value="MAIL"/> <input checked="" type="button" value="CLOUD"/>	<input type="button" value="SOCREDPROCESSCOMPLETED"/>
SO-CR000046	CUS06135	Allied Engineers	<input type="button" value="SO LIST"/>	<input type="button" value="RECYCLE"/> <input type="button" value="MAIL"/> <input type="button" value="CLOUD"/>	<input type="button" value="INAPPROVALPROCESS"/>
SO-CR000045	CUS02113	SFC ENVIRONMENTAL TECHNOLOGI	<input type="button" value="SO LIST"/>	<input checked="" type="button" value="RECYCLE"/> <input checked="" type="button" value="MAIL"/> <input checked="" type="button" value="CLOUD"/>	<input type="button" value="SOCREDPROCESSCOMPLETED"/>
SO-CR000043	CUS00202	ARMSTRONG MACHINE BUILDER	<input type="button" value="SO LIST"/>	<input checked="" type="button" value="RECYCLE"/> <input checked="" type="button" value="MAIL"/> <input checked="" type="button" value="CLOUD"/>	<input type="button" value="SOCREDPROCESSCOMPLETED"/>

< **1** 2 3 4 >

1. Click on 'SO Credit Hold Approval List'. It shows saved requests.
2. Status is shown as 'In Approval Process'. This saved request goes for approval. On approval, the request goes to QAD. In QAD, the request is unhold.