

DESIGNED FOR:

**Sage
MAS 90
MAS 200**



CreditAlerts Processes

- ⊙ Order Entry
- ⊙ Order Printing
- ⊙ Order Release
- ⊙ Invoice Entry
- ⊙ Cash Receipts Entry
- ⊙ Cardlock Daily Processing

CreditAlerts Conditions

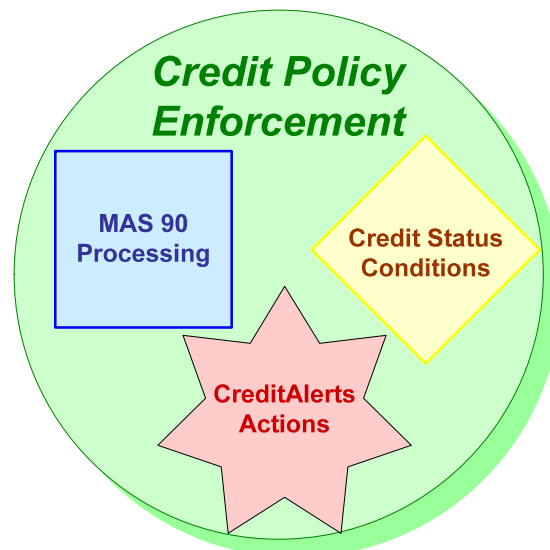
- ⊙ On Hold
- ⊙ Past Due Balance
- ⊙ Over Credit Limit

CreditAlerts Actions

- ⊙ Display Warning
- ⊙ Send Email Notification
- ⊙ Block Processing

Petroleum Marketers routinely extend credit to their customers. The impacts of slow payment, high receivables, and the costs of debt collection can easily offset narrow margins and in any case are a significant drag on the bottom line. The marketer's ability to turn a profit or even survive can be a matter of how effective the distributor is at managing credit and collections.

DM2 CreditAlerts™ extends the existing credit management tools built into MAS 90. It provides both hard rule (transaction blocking) and soft rule (notification and alerts) enforcement of your credit policies. This means you are not just told about credit conditions - you can actually have the system prevent an order or delivery from being processed until the credit condition is resolved. CreditAlerts works in the background during normal transaction processing to assess the customer's credit status and carry out the credit actions you specify.



CreditAlerts enforces your credit policy in three dimensions: Processes, Conditions, and Actions. Processes are the points in the flow of a transaction where you want CreditAlerts to become active. Conditions reflect the customer's current credit state according to Accounts Receivable, including the impact of the current order being processed. Actions are the steps you direct CreditAlerts to take when that Condition is true.

DM2 CreditAlerts™

BENEFITS

CreditAlerts allows you to:

- Automate checking for and responding to credit conditions.
- Apply credit checks and enforce your credit policy *without changing operator workflow* or retraining your staff.
- Spend your time handling credit *exceptions* instead of watching every transaction.
- Enjoy Anytime-Anywhere visibility by using Standard E-mail protocols to keep you in touch wherever your email goes.
- Reduce bad debt by preventing orders you can't collect on.
- Find out who's credit limit is too high—or too low.
- Identify good and bad credit risks so you can grow your business instead of your exposure.

CreditAlerts

Process: S/O Order Entry Condition: Customer past due

Display Warning Send Email Block Processing

Warning:

This customer has an outstanding past due balance.

To insert merge fields, position the cursor in one of the entry fields, then select the desired information below and click Insert.

Balance

Email

To: creditlist@dm2.com

Subject: Customer Past Due

<<Customer Number>> <<Customer Name>> is past due

Credit Limit: <<Credit Limit>>

Order Number: <<Order Number>>

Order Date: <<Order Date>>

Accept Cancel

CJL FTN 07/28/2003

AVAILABILITY:

MAS 90 or MAS 200
Version 3.71 or later

Supported Modules:
Accounts Receivable (AR)
Sales Order (SO)
DM2 CardLink (CL)

Email notification requires
SMTP or Outlook compatible
email.

For additional product information, or to arrange for an in-depth demonstration or place an order please contact DM2 Sales at 800.866.5151.

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