

SECURITY CUSTOMER CREDIT PERMISSIONS

The effects of denying the different **AR credit security permissions**.

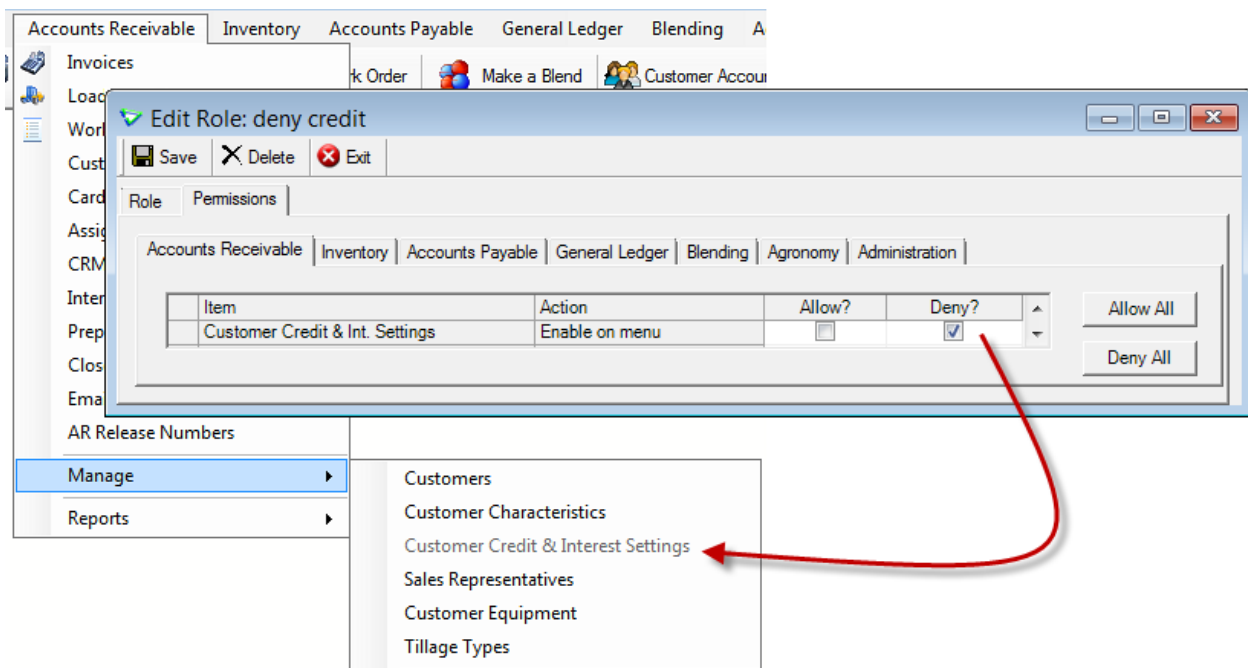
What you'll find:

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Role Permissions – Accounts Receivable tab

Customer Credit & Int. Settings

Denies access to batch editing of customer credit limits, warning ranges, and interest rates.



Customers

Edit Credit Limit / Edit Interest Rate

Denies access to the *Credit Info* and the *Interest/Terms* sections on the Customer Account *Credit/Finance* tab.

Edit Role: Credit Role

Item	Action	Allow?	Deny?
Customers	Add	<input type="checkbox"/>	<input type="checkbox"/>
	Edit	<input type="checkbox"/>	<input type="checkbox"/>
	Delete	<input type="checkbox"/>	<input type="checkbox"/>
	Enable on menu	<input type="checkbox"/>	<input type="checkbox"/>
	Add address	<input type="checkbox"/>	<input type="checkbox"/>
	Edit Credit Limit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
>	Edit Interest Rate	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Edit CRM Credit Info	<input type="checkbox"/>	<input type="checkbox"/>
	View/Edit Credit	<input type="checkbox"/>	<input type="checkbox"/>

Edit Customer: Carter, Alexander (1033)

Customer | Addresses | Contacts | **Credit/Finance** | Tax Exceptions | Permits | Farm Info | Notes | Comments | CRM

Credit Info

This is a Cash Customer (no outstanding balance - credit or charge)

- Allow account adjustments even if they create a credit or charge
- Allow prepayment deposits and prepaid work orders (i.e. prepayment plan)
- Remind me this is a cash customer when creating an Invoice

Customer has Credit Limit of

For LOTs and Invoices, treat this limit as

Warn when within

- company credit range of \$1,000.00
- custom credit range of

Unlimited Credit

Banking Information

Name	Address

Add Bank Row | Edit Bank Row | Remove Row

Interest/Terms

Interest Rate (%):

Due Date set to invoice date plus days

Chargeable Date set to

- Invoice Date plus days
- Due Date plus days

Fiscal Year End

Month:

Day:

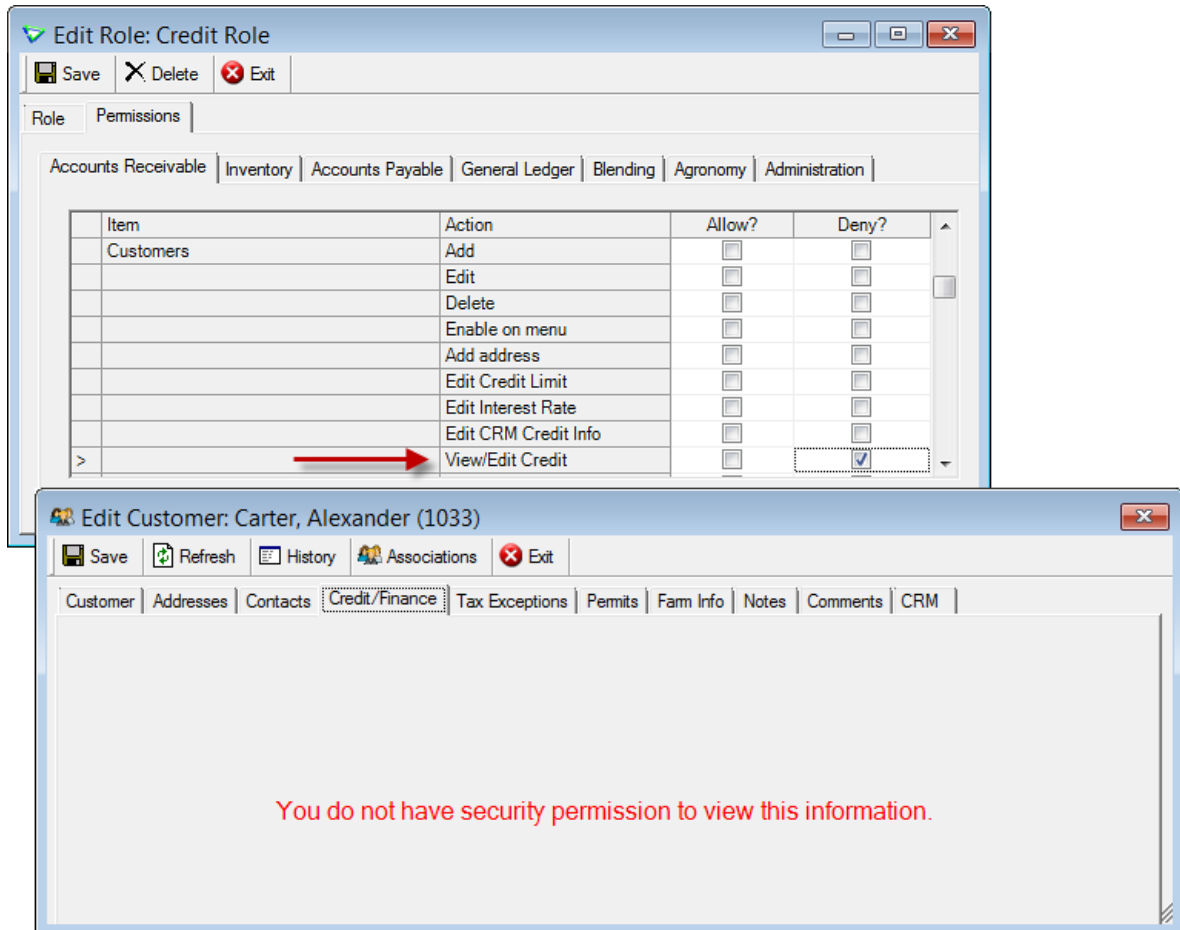
Preferred Payment Type:

can still edit Fiscal Year End and Preferred Payment Type

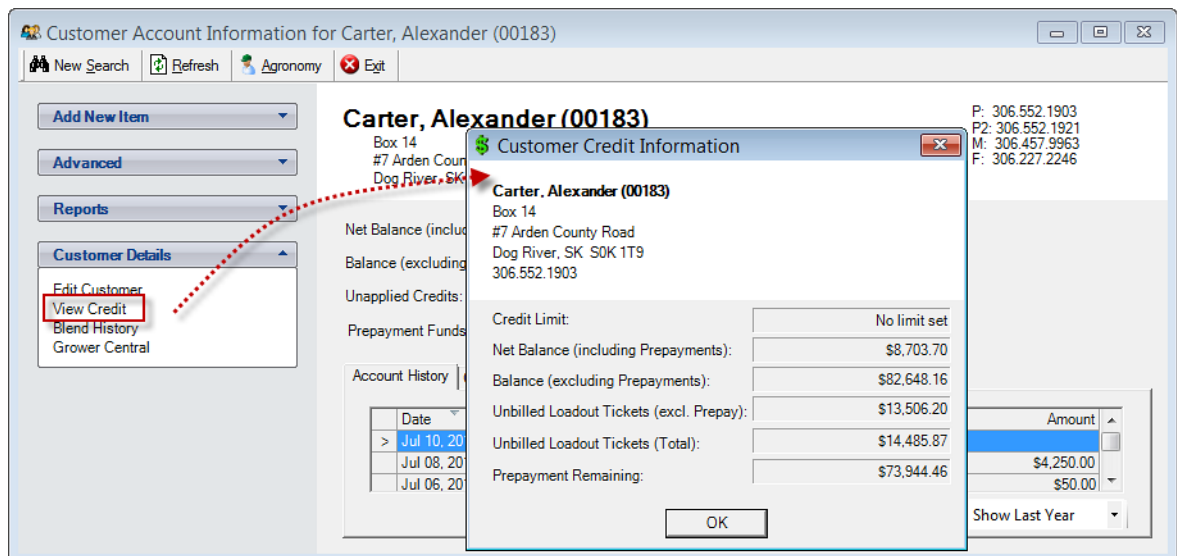
and can still edit Banking Info

View/Edit Credit

Prevents viewing of the entire **Credit/Finance tab** on the Customer Account (including Banking Info).

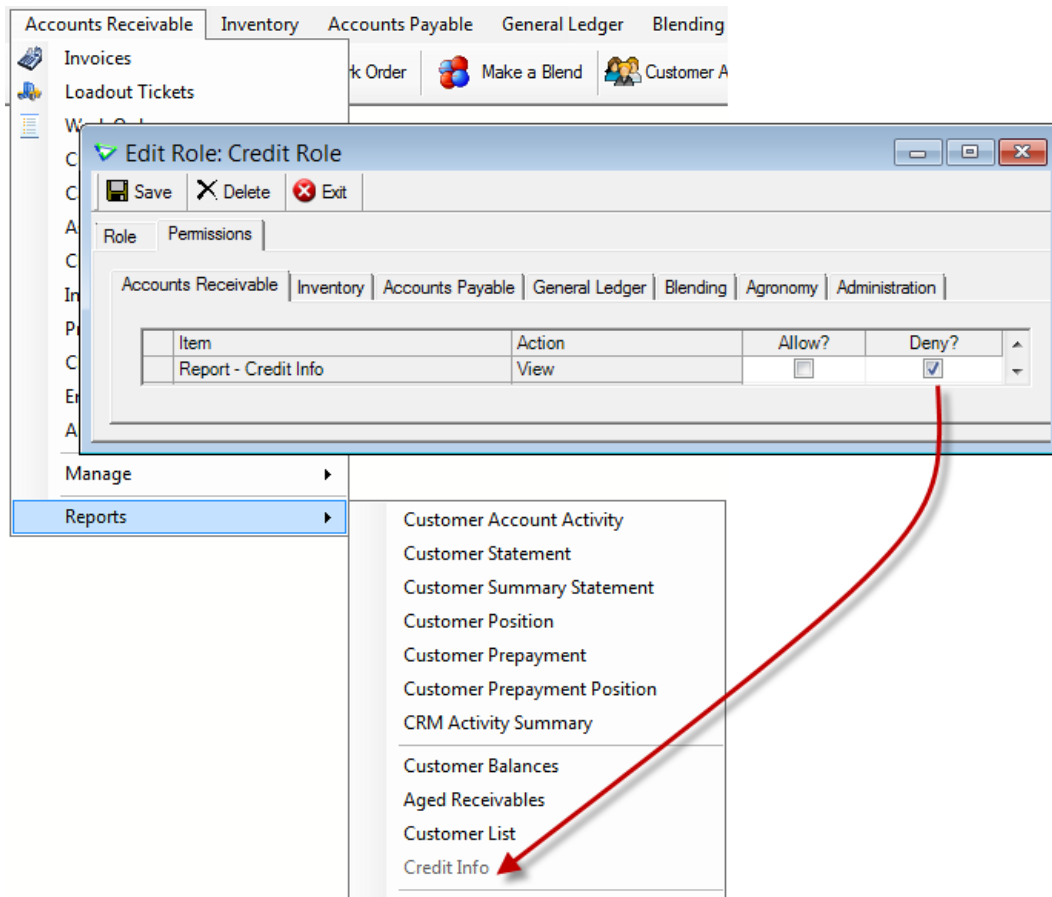


But ...does *not* deny access to **View Credit** on the Customer Account. If users are allowed to see customer accounts, they're allowed to View Credit.



Report – Credit Info

Prevents running the *Credit Info* report.



Note: If you have any questions or require further assistance with the **Customer Credit Security Permissions**, please contact your CSC at support@tronia.com.