



FACT SHEET

# Clever Credit

Get better control of overdue balances and  
approaching credit limits in  
Microsoft Dynamics 365 Business Central

# Clever Credit



Gives you better control of overdue balances and approaching credit limits in Microsoft Dynamics 365 Business Central.

## Product Overview

Applied to Roles, such as Account or Business Manager, Clever Credit puts chosen documents (for example sales orders) on hold if your customer has overdue balances or a sales order would put them over their credit limit.

### Benefits

- More payments made on time - Automated, integrated auditable credit control processes to streamline & simplify
- End unnecessary delays to key sales – Flexible credit authorisation to make the most of your credit controllers' experience
- Faster disputed payment resolutions- information available to all and defined responsibility for accounts
- Informed decision making – Real-time, reliable information on payments, cashflow, customers' credit trends & history.

### Requirements

Dynamics 365 Business Central

## Who's making sure you're getting paid on time?

Give your SMB business better control of overdue balances and approaching credit limits in Microsoft Dynamics 365 Business Central. Ensure you get paid on time, every time.

Setup your users as Credit Controllers and assign specific customer accounts to them. Clever Credit has features designed to assist credit controllers in the chasing of debts and ensuring timely payment, as well as helping with the recording of promised payment dates and ensuring they are followed up.

Give your credit controllers monetary authorisation limits to enable sales orders to be released as required. The introduction of Clever To-Do's helps to prioritise your workload and chase promised payments which are automatically closed if the amount comes in.



## Protect your cash flow

According to the latest Financial Services Bureau survey, one in ten small businesses said that 80% or more payments are typically late.

Even for a profitable, well-run company, running low on cash is a huge issue - and often payment collection is the culprit. Therefore, it's essential to arm your business with the necessary tools to effectively and efficiently perform credit management and avoid late payments.



## Don't fall into the deep end of poor cash flow

Taking control of overdue balances and the approaching credit limits of your customers is vital but can be a huge ask of your credit control team.

Our app for Dynamics 365 Business Central helps to remove some of the manual tasks from your Credit Control team, by automatically putting sales orders on hold if a customer has overdue balances or a sales order would put them over their agreed credit limit.

Spend less time chasing late payments while simultaneously reducing average Days Sales Outstanding (DSO). Help ease the drudgery of manual tasks for your vital credit management team and don't let cash flow surprises kill your business with Clever Credit for Dynamics 365 Business Central.

## Improve your business performance

Putting instantly available information on customers' payments, credit trends and history means you can confidently offer better terms to win the business you want.

You can quickly identify your biggest customers and exclude them from your credit rules to ensure their account never gets credit held.

Get started today with Clever Credit to get a real-time cash flow forecast you can rely on.





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