

Credit Manager

Sage 200c

User Guide

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Sage 200 - Credit Manager

The Roundhouse Credit Manager is a simple and easy to use enhancement for Sage 200 professional, designed to provide a dashboard for each credit controller and allow them to efficiently carry out the work required to collect the money owed to your business.

This user guide may be used once the add-on has been configured. The details of the installation and configuration process are documented in the Credit Manager setup guide which is intended to assist experienced Sage 200 consultants to install and configure the Credit Manager add-on.

Systems Options/Requirements

This module will operate from Sage 200 version 2016 to Sage 200 2021 R1 (not all features available in v2016).

Roundhouse SL Credit Manager

The Credit Manager form is accessed from a new Sage 200 desktop form on the Sales Ledger -> Sales Enquiries menu. The form shows the sales ledgers accounts filtered according to the 'last' filter which the user selected (the default is 'Overdue'). The 'License' form may appear when the form is displayed (if the add-on has yet to be licensed or the current license is due to expire in the next 'x' days). See the section on 'Software Registration' for further details.

Rh SL Cree	dit Management												-	
														G
Filter	Overdue '14' day(s)	~	Select All	Memo :										Add memo
Search Nan	1e :		Refresh	Letter :	#DebtorLetter							✓ Output to: Email	~	Send
Invoice no:			Search All									Promised Payment :	11	Update
SL Accourt	its													oposito
Code	Name	Deys Over G)verdue Balanc	promised Da	ste LastReceiptD	ate Credit Con	trolle Dispute Code/Reas	LastAcc Mer	m LastAccMemo		Sales Region	Account Balance	Credit Limit Credit Position	n Unallo 🔨
MAN008	Hardy's Home Help (builders) Ltd	353	32030.87	7 2021-08-20	17/06/2021	Sam		16/08/2021	PP this week		North West	32030.87	0.00 Good	
BIR008	Super Chef Fitments	353	14697.84	2021-08-23	28/07/2021	Sandi	[Q] Query (Other)		PP next week if courier charges are refunded		Midlands	14697.84	15000.00 Good	-10 =
MAN007	Kitchens U Like	353	48241.38	3	29/06/2021	Sam		05/07/2021	PP end of July		North West	48241.38	0.00 Good	
LON004	Kenley Class Kitchens	353		5 2021-08-20		Simon		17/05/2021	Paid		South East	42007.25	0.00 Good	-23
BIR006	Black Country Kitchens	353		5 2021-08-20		Sandi		16/08/2021	Refund requested (damaged goods)		Midlands	30847.75	0.00 Good	
HA00001	Ha & Db Kitchen Developments Ltd.	346	11681.42		07/07/2021	Simon		17/05/2021	Payment made			11681.42	0.00 Good	
BIR0101	Airport Catering Services	346		2 2021-08-31	17/05/2021	Sandi		17/05/2021	Friendly Letter Posted . Overdue 68,103.90 Days 254		Midlands	73981.02	0.00 Good	
MAX001	Max Retail Ltd	346	30840.89	9 2021-08-31	17/06/2021	Sam		05/07/2021	** PLACED ON HOLD. Overdue 30,840.89 Days 303			30840.89	20000.00	
ROS001	Rose & Woodpack & King	346	12334.92	2	17/06/2021	Sam		17/05/2021	Friendly Letter Emailed . Overdue 3,669.72 Days 254			12334.92	50000.00	_
GE0001	George Grey Construction	346	6590.14	\$ 2021-08-27		Simon		29/06/2021	Paid			6590.14	50000.00	-6
MAN003	James B Backly Ltd	346	35492.36	3 2021-08-23		Sam		17/05/2021	Paid		North West	35492.36	0.00 Good	
NEW001	Newark Lofts (USA)	346	11429.71	1	07/07/2021	Val		07/07/2021	Agreed payment plan \$500 pm			11429.71	50000.00	_
NAN001	Nantes Home Stores (Fr)	346	24136.26	5 2021-08-31	17/05/2021	Val		17/05/2021	Payment made			24136.26	20000.00	
FUT001	Future Homes Real Estate	346	27644.96	5 2021-08-31	17/05/2021			29/07/2021	L1 Sent . Overdue 27,644.96 Days 327			27644.96	50000.00	
ONT001	Ontario Construction (Can)	346	31432.18	5	17/05/2021	Val		16/08/2021	[0000004496,0000004497,0000004542] PP next week			31432.15	50000.00	
JIM001	Jim Murray Renovations	345	17608.63	3 2021-08-31	17/06/2021	Simon		17/05/2021	Kate on Holiday follow up next week			17608.63	50000.00	~
< .														E. <
Totals		353	32030.87	7								32030.87	0.00	0.
Memo(s)	Account Transaction(s) Sales Order(s	3												
memo(a)	(ccount Transaction(s) Sales order(s	1								Credit Memo				^
										Credit Mellio				~
Created					Acti	ve User		mer Account N			PP this week			
16/08/202	1 PP this week				Yes	Nigel		y's Home Help			PP this week			^
17/05/202	1 Friendly Letter Posted . Overdue 32	,030.87 Day	s 261			Nigel	Default Hardy	y's Home Help	(builders) MAN008 162363	Account Memo				
14/04/202	1 #DebtorLetter Sent . Overdue 26,809	9.03 Days 24	12			Nigel	Default Hardy	y's Home Help	(builders) MAN008 162363					~
											-			
														^
										Last Txn Memo				
1														
	-													^
Fiter : A	· ·									Status Reason				~
Amend Alloc	ation Statements New Allocation	n Add	Receipt I	Hold (Toggle)	Account Eng	uiry Tran	nsaction Enquiry An	nend Account						Close

Credit Manager Form

'Filter'

The 'Filter' button will open the Filter configuration form. The configuration form will also allow an 'Import' of SL Account memo notes and the configuration of Debtors Letters features.

• Filter drop down list The user may select a pre-defined filter for the SL accounts (e.g. "Overdue" for overdue SL accounts) which will refresh the main SL Accounts grid. The list will be stored as a preference for the sage 200 user when the form is closed (and set as the default for the user). The configuration settings will determine which items appear on the pre-defined filter list (e.g. SOP feature are enabled so the SOP Order items are displayed on the drop-down list) :

Filter		Overdue '14' day(s)	~
Search Na	me :	Overdue '14' day(s) Promised Payment Active	
Invoice no:		Overdue Older Overdue 90 davs	
SL Accou	nts	Overdue 60 days	- 1
Code	Nam	SOP Order(s) On Hold SOP Order(s) Live (Not On Hold)	
MAN008	Har	Balance	
BIR008	Sup	Overdue (Base Currency)	- 1
MAN007	Kitc	Overdue (Non Base Currency) Overdue (Default Email)	
LON004	Ken	Overdue (Default Email) Overdue (No Default Email)	
BIR006	Blac	Overdue (No Default Email or Tel)	
HA00001	Ha 8	Over Credit Limit Over Credit Limit (On Hold)	
BIR0101	Airp	Over Credit Limit (On Hold) Over Credit Limit (Not On Hold)	
MAX001	Max	On Hold	
ROS001	Ros	Unallocated	
GEO001	Geo	Recent Receipt	
MAN003	Jam	es B Backly Ltd	346

•	Find :	The user may search for a part match of the customer's name or account reference by entering a value in the 'Search Name' text box and pressing the 'Enter' key to search all customers (not just those shown on the grid based on the filter). This allows for any in bound credit control calls from a customer to be actioned quickly. Use the CTRL-H key to set focus on this text box.
•	Invoice no :	The SOP Invoice number can be entered (without leading zeros) and a search invoke by pressing 'Enter'. The customer for the SOP Invoice will then be displayed. Use the CTRL-I key to set focus on this text box.
•	Select All	Click the button to select all customer rows on the grid.
•	Refresh	The grid will not automatically refresh after customer details are updated. To refresh the data in the grid, click the 'Refresh; button.
•	'Promised Payment'	If the 'Promised Payment' SL Analysis code is enabled, then the user may select a date when the customer(s) have advised they will make a payment (any date) and update the SL Analysis value for the selected customer(s) by clicking the 'Update' button. The date value may be 'cleared' after the update if the 'Clear Values (after update)' feature is enabled.
•	'Memo'	If the 'Status (Memo)' SL analysis code is enabled then the 'Memo' drop-down list will allow the user to select the values from the Analysis code and then use the text to add a customer memo (inactive) when clicking the 'Add Memo' button. If the 'Status' SL Analysis code is not enabled then the 'Memo' text field can be used to type a memo which can be added to the customer when clicking the 'Add Memo' box. The memo text may be 'cleared' after the Memo has been added if the 'Clear Values (after update)' feature is enabled.
•	Letter	The user may select a Sage 200 'letter' (report) from the drop- down list. This may be the '#DebtorsLetter' - which is the standard layout for the Aged Debtors' letters production form which may also be run from the sage 200 desktop menu option. The Letters which appear on the drop-down list are determined by the configurations on the 'Filter' configuration form (Letters Tab)

Output to

The drop down list determines the destination of the report output (the default is Email). Sage 200 reports may be set-up with Email settings to allow the reports to be sent via MS Outlook, MAPI or SMTP.

Output to:	Email	~
	Email	
	Preview	
On Ho Sta	Spooler	ht
No	Printer	

Send
 This will perform the action the report for the selected report. The user may be able to add additional parameters for the report criteria (if applicable). Once the report is sent, if a 'memo' text values was set then an account memo (inactive) will be added to the selected customer(s).

SL Account (Grid)
 The main grid (SL Accounts) allows users to sort by any column, change the order and size of the columns. If the user double clicks on a row, then the SL Transaction Enquiry form will be displayed for the customer. The grid allows multiple customers to be selected. If Multiple customers are selected, some of the actions and fields/actions on the form may not be available/populated. The 'Tab' group control below the main grid will show 'Account Memos', 'Account (contact)', 'Transactions (current)' and Sales Orders (current) for the select account. The text box fields for 'Credit Memo' and 'Status Reason' will also be populated based on the selected Account. This is a sage 200 grid, so has the standard 'pop up' menu when the user uses the 'right click of the mouse' on the grid. The menu also includes actions for Credit Manager:

SL Accou	ints					
Code	Name		Days Over Over	erdue Balanci Pr	omised Date	LastReceiptD
LON002	Petts Wood Pantri	es	332	71909.48		28/07/2021
LON003	Canvey Island Ca	tering	339	44560.09 20	21-08-31	17/05/2021
LON004	Kenley Class Kitch	nens	353	42007.25 20	21-08-20	17/05/2021
LON005	Halstead Home Bu	ilders	311	42651.26		17/05/2021
LON006	I. M. Goode D	Update Promis	sed Payment D	ate	Ctrl+F	05/2021
LON007	Lamb's Greeb	Add Account I	Memo		Ctrl+M	05/2021
LON008	W. Baldslow (I	Update SL Ana	alysis 'Dispute C	ode/Reason'	Ctrl+U	/05/2021
LON009	Kitchens-4-All	Find	· · · · · · · · · · · · · · · · · · ·			/05/2021
LON010	Plumb-U-In					/05/2021
LON001	Barking Builde	Export				05/2021
HA00001	Ha & Db Kitch	Print				/07/2021
BIR0101	Airport Catering S	ervices	346	73981.02 20	21-08-31	17/05/2021

- Account Memo (List) The 'Account Memo' list show the memo(s) for the selected SL customer account. The 'Account' Memo text box will be populated by the selected memo. The list only allows a single memo to be selected. This is a sage 200 list, so has the standard 'pop up' menu when the user uses the 'right click of the mouse' on the list.
- Account (Contact) The 'Account' tab shows the name and address and various 'contact' fields for the selected customer.
- Transactions (Current) The 'Transactions' tab shows the current SL transactions. The 'Last Txn Memo' text box will show the most recent 'active' memo for the selected transaction. This shows the date and sage 200 user who created the transaction memo and the memo text.

The grid shows the 'overdue' items by default, but the user may uncheck the 'Overdue' check box to see all the current SL transactions for the selected customer. The list control shows a total row at the bottom of the list. This shows totals for any numeric fields (for the selected rows). The list also allows a selected SOP Invoice (or SOP Credit Notes) to be re-printed. This may be done by clicking the 'Re-print' button. If a customer requests a copy invoice, this feature may be used to generate and re-print SOP invoice to email to the customer (via the spooler). This is a sage 200 grid, so has the standard 'pop up' menu when the user uses the 'right click of the mouse' on the grid. The menu also includes actions for Credit Manager:

frans Type	Trans Date For	ecast Date Re	ference	2nd Ref	DueDate Aged Band	Outstanding Value	Value	Allocated Query	Status	Memo Days Si
nvoice	30/07/2020 29/08/2020 20/	08/2021 00	00004411	0000004348	I-Older	2361.37	8188.52	5827.15	Part	А
nvoice	06/08/2020 05/09/2020	00	00004458	0000004395	I-Older	5844.30	5844.30	0.00		
nvoice	13/08/2020 12/09/2020	00	00004632	0000004569	I-Older	3465.87	3465.87	0.00		
nvoice	11.1.1.5	0.1.5	7004634	0000004571	I-Older	608.96	608.96	0.00		
nvoice	Update Forecast Date	Ctrl+F	0004631	0000004568	I-Older	2088.40	2088.40	0.00		
nvoice	Add Txn Memo	Ctrl+T	0004672	0000004609	I-Older	1384.15	1384.15	0.00		
2122	Add Account Memo	Ctrl+M	2004075	0000004041	1.004	*0070.00	10070.00	0.00		2
Fotals	Add/Amend Query Code	Ctrl+Q				8814.63	14641.78	5827.15		
	Find									1
	Export	>	<u> </u>			No filter	~	✓Overdue	Re-print	
	Print									

Transactions

•	Memo (Text)	The memo text box on the current SL 'Transactions' tab allows a transaction memo to be added to the selected transaction(s). The 'Memo' text will be used to add a memo item when the 'Re-print' button is clicked, e.g. "copy invoice requested by Bob".
•	Re-print filter	If the selected filter is SOP Invoice/credit, then the selected Invoice/credit document(s) will be re-printed (when the 'Re-print' is clicked). The user does not need to enter any text in the memo field (if they don't want to create a memo note against the transaction) The user may enter text to the customer memo field (which will create a memo for the selected customer(s).
•	Overdue	If this check box is 'checked' then only overdue items will be show on the list.
•	Re-print	When the user "clicks" the "Re-print" button (and has selected either SOP Invoice or SOP credit item(s) in the grids) This will 're- print' and add a memo (if not blank) for the selected transaction(s).
Sal	es Orders	
•	List	The Sales Order tab shows the current orders for the selected customer in a list. The list has a totals row, this shows the total for

Order No	Order Date	Order Status	Customer Order No	Value Sales Area	Sales person	Delivery Address Postal Name	Post Code
0000005172	15/07/2021	Live		227.22 North	None	Kitchens-4-All	SE7 5CA
0000005164	19/05/2021	Live		227.22 North	None	Kitchens-4-All	SE7 5CA

may be selected on the list control.

each of the numeric fields for the select item. Only a single row

- View Order The 'View Orders' button will open the 'amend SOP order' form for the selected SOP order.
 SOP Order Status The 'Amend Order' Status form will be opened for the selected customer. The SOP Orders may be placed on HOLD (or taken off HOLD) or cancelled.
- Amend Order The selected SOP order may be amended via the SOP Amend order from.

•	Find Order	The 'View Sales Order' is launched when the 'Find Order' button is clicked. This allows the user to find a sales order (e.g., by searching on SOP Invoice number etc)
Button	Bar	
•	Amend Allocations	The 'Amend Customer Allocations' will open the 'Amend Customer Allocations' form for the selected customer.
•	Statements	The 'Statements' button will open the 'Run Statements' form.
•	New Allocation	The 'New Allocation' button will open the 'Customer Allocations' form for the selected customer.
•	Add Receipt	The 'Add Receipt' form will be opened for the selected customer. This will allow the credit controller to post (and allocate) a sales receipt.
•	Hold (Toggle)	The selected customer(s) will have their 'Account Status' toggled (e.g., if they are on hold, they will be taken off hold). A customer memo (inactive) recording the action will be added.
•	Account Enquiry	The 'Account Enquiry' button will open the 'Customer Enquiry' form for the selected customer.
•	Transaction Enquiry	The 'Transaction Enquiry' button will open the 'Customer Transaction Enquiry' form for the selected customer.
•	Amend Account	The 'Amend Account' button will open the 'Amend Customer Details' form for the selected customer.
•	Close	The 'Close' button will store the 'Filter' (drop-down value) as the default for the form, the close the form.

The buttons on the button bar will be disabled if the user role does not have access to a form.

Buttons

•	Credit Memo	The 'Credit Memo' button will set the 'Credit Memo' value from the text box as the 'Credit Memo' for the selected customer. If the user double clicks on the text field, then the "Amend Customer" form will open.
•	Status Reason	The 'Status Reason' button will set the 'Customer Account Status Reason' value for the selected customer. If the user double clicks on the text field, then the "Customer Account Status" form will open.

NB: Some of the features are only available in sage 200c (e.g., Customer Account Status and 'Forecast Date' for SL Transactions).

Software Registration

When running the software for the first time, a message will be displayed stating that the software is not licenced. To licence the application, click the Yes button as shown in screen 1.

	Roundhouse Licence
Confirmati	on Required
2	This product from Roundhouse Software Limited has not been licenced for use by your Company for the following reason: - Licence not found / invalid licence Would you like to select the supplied licence file? NOTE: If you do not have a licence file please contact Roundhouse Software Limited
	<u>Y</u> es <u>N</u> o

A new form will be displayed showing Roundhouse Software Ltd's terms and conditions of use. To licence the application, click the magnifying glass button (above the Cancel button in the bottom right corner) and select the licence file supplied by Roundhouse Software Ltd. Ensure the check box "I have read all of the above and agree to be bound by these terms" is ticked and click the OK button.

Roundhouse Licence Terms

Licence	-
Licence your Roundhouse product	
ROUNDHOUSE SOFTWARE LIMITED	Â
LICENSE AND WARRANTY	E
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I have read all of the above and agree to be bound by these terms	
Licence File:	
OK Cancel	

This process is required to be performed on only one client PC.

Technical Note

The XML licence file supplied by Roundhouse Software Ltd contains a checksum and must not be modified. When the file is selected during the above process it will be moved to the Sage\Logon folder under the Sage 200 server area. Ensure that the client PC has read/write permission to this folder.

Filter Form - Import/Update Customer (Including Customer Memo)

The 'Import A/c Memo' button on the "Filter" form will launch the 'Import/Update for Customer' form. The user may select a CSV file and import SL A/c memo notes (and also update SL Analysis codes and a few other SL fields). The file can be selected using the 'browse' button. The user may choose to just validate the CSV file.

Jpdate (SL Analysis) Status Status ✓ Category Dispute Code/Reason N/a		r Configuration				_		
Update (SL Analysis) Status Category Dispute Code/Reason Payment Date Promised Date YYYY-MM-DD Pormat back colour on row when A/c on Hold Base avg days to pay on last : Confirmation prompt if more than : Confirmation prompt if more t								
Status Status Category Dispute Code/Reason Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date YYYY-MM-DD Promised Date Yyyy-Muchaele Promised Date Yyyy-Muchaele Promised Date Promised Date Promised Date Promised Date Promised Date Promised Date Promised Dat	ers Other Letters							
Category Dispute Code/Reason Payment Date Promised Date Promoted Date P	Update (SL Analysis)							
Payment Date Promised Date Pr	Status	Status		~				
Format back colour on row when A/c on Hold Base avg days to pay on last : 12 Month(s): Enable SOP Features Confirmation prompt if more than : 0 Row(s): Clear values (after update) Auto Refresh (after update) Import/Update for Customer × The Name: File Name: Validation Only	✓ Category	Dispute Code/Reason	~ <mark>n/a</mark>					
Enable SOP Features Confirmation prompt if more than : Row(s): Clear values (after update) Auto Refresh (after update) Import/Update for Customer File Name: Validation Only	Payment Date	Promised Date	~ YY	YY-MM-DD				
	Earmat back colour on ro		lave to pay on last a	12 Month(s)				
Clear values (after update) Auto Refresh (after update) Import//Update for Customer File Name: Validation Only								
			on prompt if more than :	o Row(s):				
Import/Update for Customer				Import A/c Memo				
File Name:	O Import	/Update for Customer				- 0 X		
Validation Only		/Update for Customer	_	_			1	
Validation Only	O Import	/Update for Customer		_	_			
			_	_	_	0	1	
Import Close			-	-	-	0		
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Import				-		0		
Import						0		
	File Name					¢		
	File Name					¢		

Import/Update for Customer

The Template may be used in MS Excel to save as a CSV file.

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File	Home Insert	Page Layout	Formulas	Data R	eview View	Developer	Help Sa	ge Bl 🛛 📿	Tell me what	you want to do													,R₁ si	nare
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	Clipboard 🕞	Fo	ont	G.	Alig	nment	ß	Numb	ier 🕠	5	Styles			Cells				Ec	liting			Sens	itivity	~
A2	• : ×	$\checkmark f_X$																						~
	Α		в	с	D	E		F		G	H I	JK	LM	N 0	P	QR	s	r u	V	w x	Y	ZA	AB	
1 Cu	stomerAccountNumbe	er CustomerA	AccountName	Acc memo	Credit Memo	Credit Limit	PaymentT	ermsInDays	SYSPayme	ntTermsBasis	Na Na	Na Na	Na Na	Na Na	Na I	la Na	Na N	a Na	Na	la Na	a Na	Na Na		
2																								_
4																								
-	Aged Debto	ors Transac	ctions Cus	tomers (Cash Receipts	Import Tem	plate Imp	oort Sample	+		4													Þ
9 																	#		≞			1	- + -	100%

An 'Import Sample' file is also supplied in the 'Demo' Credit Manager MS Excel report. The columns H to AA many be used to update the SL Analysis Codes 1 to 20 (if used). The headings may be set to the name of the SL Analysis code (or Na if not used in the Sage 200 company)

≣ち∙∂∽∓	Rh Sa	ge 200 Credit Manager - Demo v2.:	ılsx - Excel			(Nigel	Smith	NS	œ -	- 0	
File Home Insert Page Layout	Formulas Data Review View Developer Help Sage Bl 📿	Tell me what you want to do												8	구, Share
Calibri B Copy → Software Software Clipboard S Format Painter	11 ∧ ∧ ⇒ ∅ № ∅ № ∅	Conditional Form Formatting * Tal	Normal Good Style		d utral	* * *	insert	Delete Format	∑ Au ↓ Fil 	ear -	Z T Sort 8	Find &		vity	
24 * i × √ fx 27	/02/21 tried calling no answer no vm, have emailed for payment date														
AB	c	D	E	F	G	H	i lu li	K L M N		QF	s	τU	v w b	y z	
Customer CustomerAccountName	Acc memo	Credit Memo	Credit Limit	PaymentTer	SYSPaymen	t Na N	a Na N	a Na Na N	a Na Na	a Na Na	a Na N	a Na I	Na Na N	a Na Na	a Na
ABB001 Abbey Retail Ltd				-											
BEN001 Bensham Manor School	** Proforma **			0											
BET001 Better Kitchens	27/02/21 tried calling no answer no vm, have emailed for payment date														
CLA001 Clares Business Solutions Ltd.															
COU001 Country Kitchens		Pays on 14th of the month													
EUR001 European Electronique															
FES001 Festival Homes Ltd															
FUT001 Future Homes Real Estate															
GRE001 Greene Kitchen Stores															
KIT002 Kitsch Kitchens				30	1	2									
SHI001 Shiny Things															
SIN001 Sinead Smith Interiors															
STE001 Stepien Lake LLP				60	3	3									
STY001 Style Right Design			25000												
THI001 THINKING JUICE LTD															
TIG001 Tiger Build															
TOT002 Total Home Care Birmingham															
TOT005 Total Home Care London															
TTC001 TT Construction Ltd															
TUL001 Tulip Enterprises Ltd															
WIL03 Williams Grand Prix Eng Ltd															
YOR001 YORKSHIRE RETROFIT LIMITED															
Aged Debtors Transacti	ons Customers Cash Receipts Import Template Import Sample	+		E 4											1
										FB	E	J -			+ 10

SOP Feature (Full Order Entry/Amend Order)

The 'Credit Status' field will be show on the SOP order form (and amend SOP order) if the SOP features are enabled. If the user has 'permission' to access the Credit manager form, then after the customer is selected the 'Credit Info' button will be enabled.

Account Selection	voicing Payment with Order	Order Detail						
account selection	Customer account Cash account	Order betain	000005132					
ode:	STY001	Order status;	Live					
ihort name:		Document date:						
			25/03/2021	26/03/2021				
Postcode:	NE10 9SP V	Date requested / promised:	26/03/2021	26/03/2021				
lame:	Style Right Design	Customer order no:						
ly default supply from:	WAREHOUSE ~	Credit Status:	Overdue Invoices					
							Show values	O Show quantities
	Description		_		Quantity	Unit Price	Disc. % VAT Rate	Ne
ACS/ESPRESSO	Espresso Machine		_		1.00000	299.60000	Disc. % VAT Rate 0.00 Std Rate	Ne 299.6
tem ACS/ESPRESSO CA/WALL/H70/OAK WW/WASHERDRY/160	Espresso Machine Oak Wall Cabinet H70cm	_	-				Disc. % VAT Rate	Ne
ACS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm	_			1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm				1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm	_			1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm				1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm				1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
CS/ESPRESSO CA/WALL/H70/OAK	Espresso Machine Oak Wall Cabinet H70cm				1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACSIESPRESSO JAWALL/H70/OAK WWWASHERDRY/160	Espresso Machine Oak Wall Cabinet H70cm 0 Washer Dryer 1800 spin	Subiotales	Totals		1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACSIESPRESSO DAWALUH70/DAK WWWASHERDRY160 Add tems Eddt	Espresso Machine Oak Wall Cabinet H70cm	'n			1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1
ACSIESPRESSO CAWALLHT0/OAK WWWASHERDRY/160	Espresso Machine Oak Wall Cabinet H70cm 0 Washer Dryer 1800 spin	n Subtotals Goods: & 859: Charges: & 0.01	20 Net:		1.00000 1.00000	299.60000 209.10000	Disc. % VAT Rate 0.00 Std Rate 0.00 Std Rate	Ne 299.6 209.1

The Credit Status Indicator is designed to provide a clear visual display of the current credit status of your customer at Sales Order Entry.

Upon selecting a customer, a credit check is performed to determine whether the customer is over their credit limit (including the current balance and the value of current orders in SOP) and whether there are any overdue invoices.

The Credit Status traffic light will be continually refreshed each time the order value changes so that the order taker is immediately informed if the customer exceeds their credit limit.

The following credit statuses may be shown:

• Under credit limit with no outstanding invoices:

Credit Status:	ок	
Under credit lir	nit with overdue invol	ices:
Credit Status:	Overdue Invoices	
Over credit lim	it with no outstanding	invoices
Credit Status:	Over Credit Limit	
 Over credit lim 	it and with overdue ir	voices:
Credit Status:	Over Credit Limit/Overdue In	ivoices

Please advise if any of the information in this user guide is incorrect. The forms may vary in different versions of Sage 200.

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Sage 200 Credit Manager



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