



Reset Form

Credit Limit Setup or Change Form

All credit limits in AX must be mandatory. If the credit limit is exceeded, it has to be blocked.

Customer Name _____

Customer Account # _____

Annual Sales (Prior Year) USD Source _____

Sales Forecast (Next full Year) USD Source _____

Credit Limit (25% of Sales Forecast) USD

Payment Terms Payment Discount _____

Delivery Terms _____

Old Credit Limit (If Existing Account)

New Credit Limit USD

Pending Credit Limit Increase (Needs Approval) USD

Comments/Reasons:

Title	Name	Signature	Date
Requestor	Regional Manager	_____	_____

Verification of Credit Reference

	Name	Signature	Date
Sufficient Credit Rating*	Associate Accountant Terri Fleming	_____	_____

Credit Limit Increase Approvals

	Name	Signature	Date
1. 4,000 increases above the Bosch range 2. Up to 20,000 increase with the Bosch range	Account Supervisor Karen Farley	_____	_____
1. 20,000 increases above the Bosch range 2. Up to 200,000 increases with the Bosch range	VP of Sales and Marketing Michael Casole	_____	_____
1. 200,000 increases above the Bosch range and above	Finance Director Julia Chayun	_____	_____

Credit Limit Setup or Updated In Customer Master Data

	Name	Signature	Date
Entered in Axapta by Finance	Accountant Wylene Roddey	_____	_____
Verified in Axapta by Finance	Database Admin Jessica Boartfield	_____	_____