

# CREDIT MANAGEMENT

O2C PRO



# Webcollect

Webcollect's Credit Management module automates the operations of a company's credit department. Credit history is verified, and credit limits are automatically suggested by the credit agency of your choice. The system dynamically tracks the risk profile of each customer and automatically switches to a more pro-active collections strategy if the customer's credit profile deteriorates.

## INTEGRATION

- Out of the box integration with Experian and D&B
- Integrated document storage system for credit application and all related supporting documents
- Electronic documents can be easily uploaded or sent in with email
- SOC Type 2 compliant platform

## CREDIT APPLICATION

- Web-based credit application branded to seamlessly integrate with client website
- New customer verification against existing accounts
- Credit application approval workflow

## CREDIT DECISIONING

- Automated credit approval of new customers
- Credit information view is configurable by role and user
- Annual credit review alerts
- Stores prior write-off and bankruptcy information on the customer account

## CREDIT LIMIT

- Accommodates parent/child relationship when setting credit limit. Credit limit can be aggregated at any level
- Proposed Credit Limit can be overridden within level of authority
- Credit utilization trending
- Approaching credit limit breach alerts
- Credit limit overdraft alerts
- Credit limit change requests with levels of approval

## CREDIT HOLD

- Visibility of credit stop reason, actioned by, date and time
- Customers that should move to credit stop are part of the priority list and treatment plan
- Distributes proposed credit stop customers to external parties for approval (i.e. to sales group)
- Alert for payments while on Credit stop
- Notification of accounts with a change in the credit stop flag

## ANALYTICS

- Configurable real-time performance dashboard
- Bad debt analysis
- Trending on all historical performance data
- Built in Reporting Module supports all standard and ad hoc credit reporting needs



For general inquiries or to schedule a demo

Phone: +1 954.903.7500

Email: [info@o2cpro.com](mailto:info@o2cpro.com)

Website:

<https://o2cpro.com>