Configure Customer, Credit, Loyalty, and Party Rules

How to Configure Customer, Credit, Loyalty, and Party Rules in Muhasib ERP

Overview

This guide will help you configure how Muhasib creates parties and applies customer credit, loyalty, and commission rules.

New party creation, sales, returns, ledgers, loyalty balances, and commission reports use needed rules. Existing balances may remain unchanged until recalculation or new activity.

Who can do this

You need access to Global Configurations and authorization from finance/sales management.

Before you start

Record current settings and prepare synthetic customer, supplier, group, commission-agent, service-staff, item, sale, return, and payment data.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Settings → Application/Global Settings → Party Settings, Loyalty Points, and needed POS settings.

Configure Customer, Credit, Loyalty, and Party Rules

Step 1: Decide whether the same party may hold customer and supplier roles

Step 2: Configure contact-duplication and mandatory customer-group rules

Step 3: Configure whether credit limits are enabled, the default limit, and

Configure whether credit limits are enabled, the default limit, and exceed-warning behavior.

Step 4: Configure party-ledger transaction detail display

Step 5: Configure commission calculation bases, staff auto-assignment, and return deductions

Step 6: Configure loyalty calculation basis, eligible sale type, currency equivalence, and

Configure loyalty calculation basis, allowed sale type, currency equivalence, and expiry days.

Step 7: Save and reopen customer/POS forms

Check your work

Run controlled creation, sale, payment, return, loyalty-ledger, commission-ledger, and report cases. Confirm both below-limit and over-limit behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not edit limits to conceal overdue balances.
- Check plan/permissions if loyalty or commission controls are absent.

Related guides

- Create a Customer
- Configure Customer Credit and Loyalty
- Review the Customer Loyalty Points Ledger
- Pay a Commission Agent

What to do next

> **Create a Customer**.

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