Configure Customer Credit and Loyalty

How to Configure Customer Credit and Loyalty in Muhasib ERP

Overview

This guide will help you configure the customer's approved credit and loyalty participation and check transaction behavior.

POS/customer workflows can warn or restrict based on credit settings and calculate loyalty based on company rules.

Who can do this

You need access to Customer Update and needed credit/loyalty operation rights.

Before you start

Configure company credit/loyalty rules and get approved customer limit, eligibility, opening credits/points, and expiry policy.

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

Where to find it

Back Office → Sales & Customers → Manage Customers; company defaults are in Global Settings → Party/Loyalty.

Configure Customer Credit and Loyalty

Step 1: Select the customer

Step 2: Enable/configure credit only as approved and enter the limit

Step 3: Configure loyalty eligibility/status where available

Step 4: Save

Step 5: Test sale below and above credit limit

Step 6: Test points earn/redeem/return/expiry with synthetic transactions

Check your work

Compare and Confirm Customer Ledger, Due/Ageing, Loyalty Points Inquiry/Ledger/Report, invoice, payment, and return.

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

If something goes wrong

- A warning may not be a hard block.
- Do not change the limit to conceal overdue debt.

Related guides

- Configure Customer, Credit, Loyalty, and Party Rules
- Add Customer Credit
- Review the Customer Loyalty Points Ledger

What to do next

> **Configure Customer, Credit, Loyalty, and Party Rules**.

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