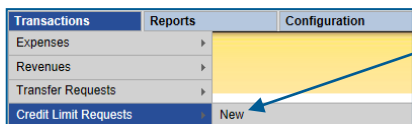


Quick Tip 12 - Submitting a Credit Limit Request

This reference will show you how to submit a *Credit Limit Request* to increase the credit limit on your Unit purchase card.

IMPORTANT TO REMEMBER: The billing cycle runs from the 28th of the month to the 27th of the next month. Purchase card charges are only cleared off the card **once per month** on the 28th. Any purchases made between the 28th of the month and the current date will reduce the available credit balance on your card.

Before you input a credit limit increase request, make sure you know the purchase card holder's information. You enter one request for each purchase card holder (you cannot enter two purchase card holders on one limit request).



Step 1: To open the form, hover your cursor over **Transactions** and then over **Credit Limit Requests** and click **New**.

Step 2: Input the Cardholder's information: name on the Unit's Purchase Card, the last 4-digits, email address and phone number. After your request is processed, the confirmation will be sent to the email address provided.

User	00000
Unit Name	1st Toronto Guiding Unit
Cardholder Name	
Last 4-digits of card number	
Email Address	
Phone Number	

} Cardholder will be contacted after the request has been processed.

Step 3: Input the request details: Select whether the request is **permanent*** or **temporary** and complete the remaining fields.

A. The **Current Credit Limit** is the limit that is set on your purchase card. For Units with one cardholder, the current limit is **\$300**. For units with two cardholders, the limit is split **\$150** each. If you have a permanent guiding year limit, you enter it here.

Type of Increase	<input checked="" type="radio"/> Permanent <input type="radio"/> Temporary
Current Credit Limit	\$ <input type="text"/> A
New Credit Limit Requested*	\$ <input type="text"/> B <small>*There must be sufficient funds in the account to cover the requested limit.</small>
Reason for increasing the card limit	<input type="text"/> C

B. The **New Credit Limit Requested** is the new limit that you require. If you have enough funds in the unit account, we recommend to round up your limit increase; in case purchases are more than you budgeted.

C. Enter the reason for increasing the limit, be specific. You can enter the amount you have budgeted (example: going to camp and need to buy food and supplies, budgeted at \$475).

DOUBLE CHECK If you already have charges on your card for the current billing cycle, you will need to add this amount to your **New Credit Limit Requested** amount. For example: you already have \$175 charged on the purchase card and your next purchase will be \$800. You should input a \$1,000 (\$175 + \$800 + extra) as the **New Credit Limit Requested**.

D. Select the Dates: The **Start and End Date** is the time you need the request to take effect. The **End Date** should always be on the 28th day of the month.

Tip: If you would like a copy of the request, you will need to print the page **before** you press the Save button.

E. Submit the request: Click the **Save** button. The form will disappear and the "Credit Limit Increase Request has been submitted" message will appear.

When will you require the increase to take effect?

Start Date (mm/dd/yyyy) **D** End Date (mm/dd/yyyy) **D**

August 2014							August 2014						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2	27	28	29	30	31	1	2
3	4	5	6	7	8	9	3	4	5	6	7	8	9
10	11	12	13	14	15	16	10	11	12	13	14	15	16
17	18	19	20	21	22	23	17	18	19	20	21	22	23
24	25	26	27	28	29	30	24	25	26	27	28	29	30
31	1	2	3	4	5	6	31	1	2	3	4	5	6

E Save

To **cancel** the request before saving, click on the **Logo** in the top left corner to be directed back to the Main Screen.

*A permanent limit is valid until the end of the current Guiding Year and will be cancelled if your unit's balance is not maintained.