Guide 7 - View list of credit limits

Accessing your credit limits

To view a list of all credit limits which you have with Atradius, the Credit limits option can be selected from the left hand navigation menu.

You can also access your credit limits from the Credit management page for your selected policy or policies.

> **TIP**
>
> **Credit limit overview**
>
> The Credit limits panel on the Credit management page allows you to access all your credit limits by clicking the 'View all limits' link. Alternatively, you can select the number of total active credit limits and pending decisions for your selected policy or policies. This will automatically take you to the Credit limits page, where the relevant details will be displayed as a list. You will also be able to download a list of your credit limits by selecting the 'Export all limits' link, where a file will be generated and presented under the Exported files tab of the File Import and Export page.

> **TIP**
>
> Read Guide 2 – Credit management page to learn more about accessing the credit limits overview

Viewing your credit limits

On the Credit limits page, you will be presented with an overview of all your active and pending credit limit decisions.

Credit limits

The 'Credit limits' page allows you to view either your active or your historic limits. You can sort these limits and use the advanced filters provided to filter the limits shown.

Selected policies

Policy ID	Customer name	Renewal date	Status	> Select all policies
541170	ASCOTT BUILDING	01/07/2020	Live	Change selection
Country	**Currency**			
Andorra	EUR			

Active cover	Historic cover (past 3 years)

Buyer name, Buyer ID, Customer reference or cover ID:

[   ]   ⌄ Advanced filters 7   Reset filters   Apply Filters

Currency	Sort by	Order by	
Euro (EUR) ⌄	Buyer name ⌄	(A-Z) ⌄	☐ Group by country name

Buyer name	Buyer country	Customer reference	
VAKMAATSCHAPPIJ NV	Belgium	--	**Credit limit**
Buyer ID	**Buyer rating**	**Status**	**21,000**
3396960	56	Approverd	(EUR)
Policy ID	**Decision date**		
541170	17/05/2020		

> View cover   > Amend cover   > Cancel cover

Buyer name	Buyer country	Customer reference	
VERPAKKINGEN GROEP NV	Netherlands	--	**Credit limit**
Buyer ID	**Buyer rating**	**Status**	**225,000**
5291466	37	Reduced	(EUR)
Policy ID	**Decision date**		
541170	08/05/2020		

> View cover   > Amend cover   > Cancel cover

Buyer name	Buyer country	Customer reference	
GLOBEX S.A.R.L.	Netherlands	--	**Credit limit**
Buyer ID	**Buyer rating**	**Status**	**160,000**
3981957	28	Approverd	(EUR)
Policy ID	**Decision date**		
541170	11/05/2020		

> View cover   > Amend cover   > Cancel cover

As Atradius Atrium displays a maximum of 500 credit limits on the screen, you will be able to fine-tune the list by selecting a policy or policy group. This can be done by selecting one or more of your policies from the selection panel, which appears at the top of the Credit limits page and the Credit management page.

Policy selection

TIP

If you have access to more than one policy, the selection will either be set to 'All policies' or to your selected default policy if set under the account defaults page.

Selected policies	
Policy ID All policies	**Change selection**

You can select one or multiple policies by clicking Change selection. Enter your policy number or name of the policy group to quickly find your policy or policies. You can also use the check boxes to find and select your policies. Once you have made your selection and clicked the Select policy link, you will be taken back to the previous page.

Showing 3 of 3 policies

Policy ID, policy group or customer name:

☑ Live policies only   ☑ Single policies   ☑ Grouped policies   Sort by Name (A-Z) ▾

Policy ID 541170	**Customer name** ASCOTT BUILDING	**Renewal date** 01/07/2020	**Status** Live	❯ Select policy ❯ View policy
Country Andorra	**Currency** EUR			

Policy ID 548714	**Customer name** ASCOTT CARPENTRY	**Renewal date** 01/09/2020	**Status** Live	❯ Select policy ❯ View policy
Country Andorra	**Currency** EUR			

⌄ **ASCOTT MULTINATIONAL** (1 policies)

Policy ID 542035	**Customer name** ASCOTT SERVICES	**Renewal date** 01/09/2020	**Status** Live	❯ Select policy ❯ View policy
Country Andorra	**Currency** EUR			

Page 1 of 1 (1-3 of 3 items)   ⟪ ⟨ 1 ⟩ ⟫   Show 5 ▾ results per page

In the Selection panel, you will then find your selected policies.

Selected policies				
Policy ID 541170	**Customer name** ASCOTT BUILDING	**Renewal date** 01/07/2020	**Status** Live	❯ Select all policies
Country Andorra	**Currency** EUR			**Change selection**

TIP Read Guide 12 - Account settings to learn more about how to set a default policy

The Credit limits page is split into two main views. The Existing cover tab provides a list of all active credit limits and currently outstanding applications across your chosen policy selection. In the Historic cover tab, you will find all previously submitted applications, and archived limits such as those that have been cancelled, withdrawn, superseded or expired in the past 3 years.

Active cover	Historic cover (past 3 years)

You can also type the Policy ID, policy group name or buyer name into the keyword filter, which will narrow down the number of results displayed on the screen. You can also further refine your criteria using the advanced filters to find specific limits of interest.

By default, you will see all credit limits that you currently have with Atradius, but you will have the option to deselect cover types or the Atradius decision amount categories that you do not want to be displayed. You can set a date range to filter on the Decision date for active credit limits, as well as the Application date for new applications. The country filter additionally allows for one or many countries to be added, displaying only those limits where cover exists for the selected filters.

Where your filter selection results in multiple credit limits, you can view these by navigating through each pagination page.

Pagination

When viewing a list of results, Atrium will present a set of pagination options at the bottom of the page. This allows you to easily navigate between multiple pages of results, as well as influence how many items are shown on each page.

| Page | 1 | of 3 (1-5 of 11 items) | ⟨⟨ ⟨ **1** 2 3 ⟩ ⟩⟩ | Show | 5 ⌄ | results per page |

- Where there are multiple pages of results, the pagination section will show you the current page that you are on, how many pages there are in total, and the range of results shown for the current page (e.g. 1-5 out of 11 items).

- Within the centre of the pagination section, you can navigate between each page of the results, with the ability to go forward or backward a single page, or to quickly jump between the very first or very last page of the results.

- Finally, you will be able to set how many results are shown for each page. This will allow you to set this to 5, 10 or 20 items per page. You can also set how many results are shown for every listings page in Atradius Atrium under your account defaults.

Read Guide 12 - Account settings to learn more about changing your account defaults

You can sort and order how the list of credit limits will appear on your screen. For example, this can be sorted by Buyer ID, Buyer name, your own reference or the cover amount; this can then be ordered by ascending or descending order. Additionally, if you have cover in place for buyers across multiple countries, Atradius Atrium provides you with the option to group these by country. Finally, you can convert the credit limit amounts which are displayed in the credit limits list to a currency of your choice from a list of options provided.

Currency	Sort by	Order by	
Euro (EUR) ⌄	Buyer name ⌄	(A-Z) ⌄	☐ Group by country name

Viewing credit limit details

For each credit limit or pending decision shown in the results, an overview panel is presented. Here you will be able to view its most important information, such as the Buyer name, Buyer ID, country of the buyer, your own reference, application details and the amount that has been requested or agreed.

Buyer name **VAKMAATSCHAPPIJ NV**	**Buyer country** Belgium	**Customer reference** --	Credit limit **21,000** (EUR)
Buyer ID **3396960**	**Buyer rating** 56	**Status** Approverd	
Policy ID **541170**	**Decision date** 17/05/2020		

> View cover   > Amend cover   > Cancel cover

At the right of this panel, there are three additional options that you can select:

View cover   Selecting this option will take you to the Cover details page, where you will be able to view details such as the application amount, the agreed amount and any conditions or explanations which may apply to the decision

Amend cover   Selecting this option allows you to increase the application amount or change your own reference

Cancel cover   Selecting this option will give you the possibility to cancel an active limit or a pending decision

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TIP   Read Guide 16 - Cover details to learn more about working with existing credit limits or applications

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