highako
by HighRadius

Credit Analyst Training Program

This program is designed to give you an expert level understanding of the analysis of financial statements and credit risk assessment methods.

Meet Your Expert Instructors

Robert S. Shultz
Founder,
Quote to Cash Solution

He has thirty years of experience as a global credit and financial executive for large multi-national companies. He is the Founding Partner of Quote to Cash Solutions

Krishna Palepu
Oracle R12 Consultant,
Forcitude

Oracle EBS R12 Functional Consultant with 20+ years of experience in the areas of Oracle Applications implementation, Financial System analysis, design, development, testing and maintenance

Meeran Shah
AVP, SAP Consulting,
HighRadius

SAP Senior Executive with 21+ years of experience in Manufacturing & Supply Chain, SAP Cloud etc

Anubhav Kandpal
Associate Program Manager, HighRadius

He has been with HighRadius for nearly 8 years and has worked in both SAP and HighRadius Cloud Applications

Credit Analyst
Course Curriculum

1.

The A-Z of Business Credit Application

▶ How to Design a Credit Application
▶ Twenty Five Checkpoints for A Risk-Proof Credit Application

Robert S. Shultz

🕐 40 mins

`O2C`

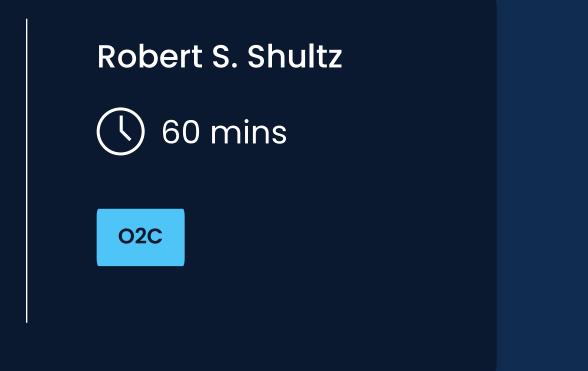**2.**

Business Credit Report Analysis & Evaluation

▶ Twenty One Signs to Watch Out for in Industry and
▶ Trade Credit Reports
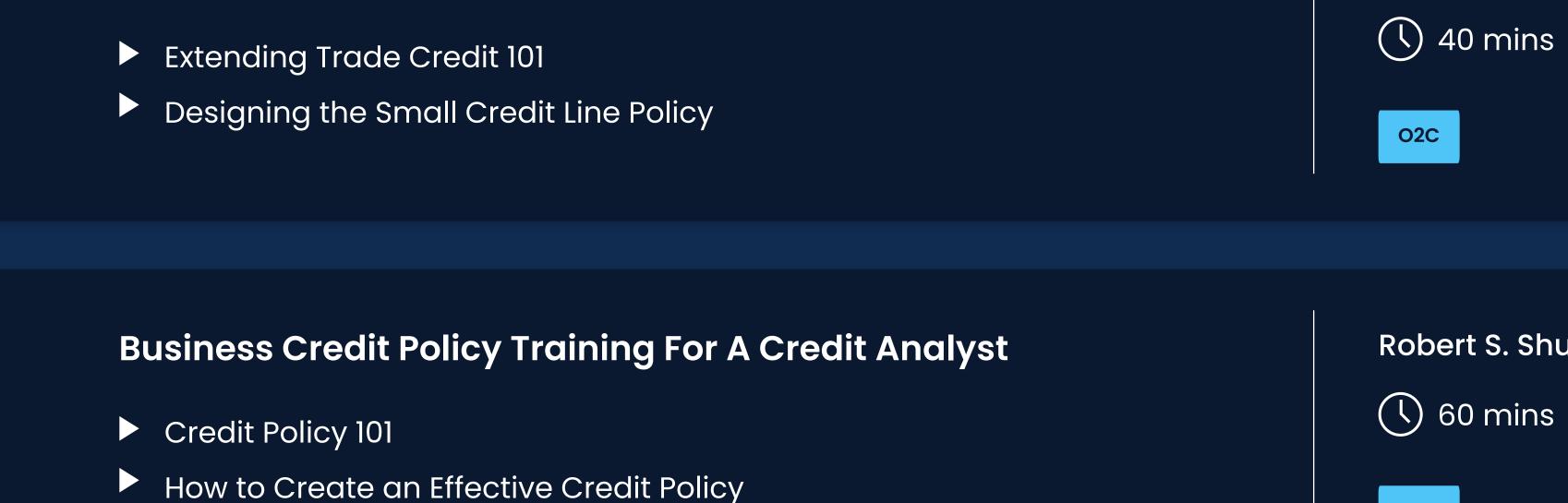▶ LIVE Credit Assessment Using Industry and Trade
▶ Credit Reports

Robert S. Shultz

🕐 60 mins

`O2C`

3.

Financial Statement Analysis for Trade Credit Analysts

▶ Credit Analysis is More Than the Math
▶ What to Look for in Financial Statement
▶ How to Read a Balance Sheet
▶ Profit and Loss Statement Analysis
▶ Cash Flow Analysis in Financial Statement
▶ Key Ratios and Trends to Monitor, Value of Benchmarking
▶ Financial Statement Analysis During Economic Downturn

Robert S. Shultz

🕐 120 mins

`O2C`

4.

Credit Risk Assessment for Trade Creditors

▶ Extending Trade Credit 101
▶ Designing the Small Credit Line Policy

Robert S. Shultz

🕐 40 mins

`O2C`

5.

Business Credit Policy Training For A Credit Analyst

▶ Credit Policy 101
▶ How to Create an Effective Credit Policy
▶ Portfolio Segmentation for Credit Scoring and Assessment
▶ Eleven Ways An Effective Credit Policy Could Transform Your

Robert S. Shultz

🕐 60 mins

`O2C`

6.

Introduction to Oracle Customer Data Management

▶ Customer master 101: Understanding Oracle Trading Community Architecture(TCA)
▶ Oracle EBS: Fundamentals of Multi-Org Structure
▶ Oracle EBS: Implementation of Multi-Org Structure
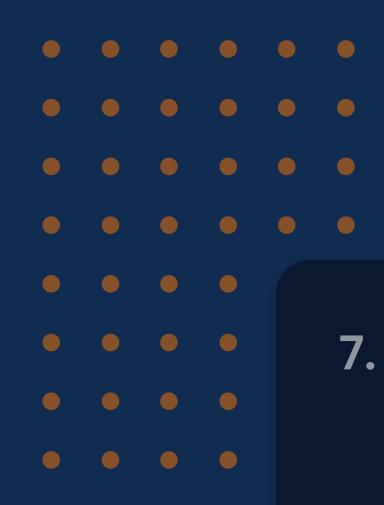▶ Creating New Customer Account in Oracle E-Business Suite
▶ Oracle Credit Management: Defining Low-Risk Credit Profile Class
▶ Oracle Credit Management: Defining High-Risk Credit Profile Class
▶ Oracle TCA: Defining Reciprocal Relationships

Krishna Palepu

🕐 60 mins

`ORACLE`

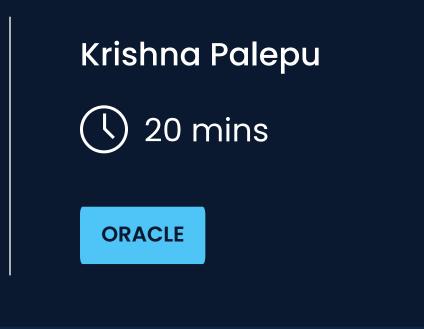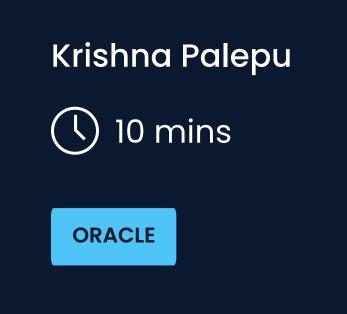**7.** **Oracle Training in Credit Holds and Order Release**

▶ Credit Check and Order Hold in Oracle
▶ Blocked Order Management in Oracle

Krishna Palepu

🕐 20 mins

`ORACLE`

8. **Oracle Credit Management Application Workflow**

▶ Oracle Credit Management Workflow | Basic Steps
▶ Oracle Credit Management Workflow | Advanced Steps

Krishna Palepu

🕐 10 mins

`ORACLE`

9. **SAP Customer Master Data Management | T-codes & Best Practices**

▶ Understanding General and Company Code in SAP
▶ Understanding and Updating Sales Area Data in Customer Master
▶ How to Create and Use Reconciliation Accounts in SAP
▶ SAP Business Partner | Basics & Configuration
▶ How to Add Insurance Data on SAP Customer Master

Meeran Shah

🕐 40 mins

`SAP`

10. **Credit Scoring in SAP Credit Management Module**

▶ How to Add a Credit Limit in SAP Customer Master
▶ Updating Customer Credit Limits in SAP
▶ How to Update Payments Terms for a Customer in SAP Customer Master

Meeran Shah

🕐 20 mins

`SAP`

11. **SAP Credit Management Tutorial | Credit Model & Approval**

▶ How to Configure a Credit Model in SAP Credit Management
▶ The Credit Approval Workflow in SAP Credit Management
▶ Fundamentals of SAP Credit Management

Anubhav Kandpal

🕐 60 mins

`SAP`

12. **Credit Scoring Rules and How to Configure them in SAP**

▶ Understanding Credit Scoring in SAP
▶ Creating Credit Segments in SAP
▶ Defining Rating Procedures for SAP Credit Scoring
▶ How does SAP Process the Formulas
▶ Understanding Scoring Formulas Through Examples
▶ Configuring Credit Limit and Credit Scoring Rules in SAP

Meeran Shah

🕐 30 mins

`SAP`

13. **Credit Agency Data and How to Capture them in SAP**

▶ Understanding Credit Rating in SAP
▶ Capturing Credit Rating and Rating Institute in SAP
▶ Configuring Credit Standing Data in SAP Credit Profiles
▶ Configuring Credit Agency Rating under SAP Ratings Tab

Meeran Shah

🕐 30 mins

`SAP`

EXPLORE MORE