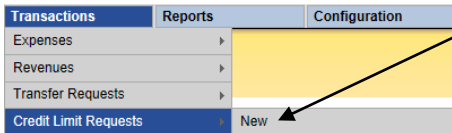


Quick Tip 12 - Submitting a Credit Limit Request

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 27th of the month to the 27th of the next month. Purchase card charges are only cleared off the card **once per month** on the 27th. Any purchases made between the 27th of the month and the current date will reduce the available credit balance on your card.



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

User	000000
Unit Name	1st Toronto Guiding Unit
Cardholder Name	<input type="text"/>
Last 4-digits of card number	<input type="text"/>
Email Address	<input type="text"/>
Phone Number	<input type="text"/>

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

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.

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

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

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.

B. The **New Credit Limit Requested** is the new limit that you require.

C. Enter the reason for increasing the limit, and/or the amount you have budgeted. Example: going to camp and need to buy food and supplies, budgeted at \$375.

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 \$116 charged on the card and your next expense will be \$800. You will need to input **\$916** (\$116 + \$800) 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. You do not need to input any dates for a **Permanent** increase request. The **End Date** should always be on the 27th day of the month.

When will you require the increase to take effect?

Start Date (mm/dd/yyyy)							End Date (mm/dd/yyyy)																																																																																																																						
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E. Submit the request: Click the **Save** button. The form will disappear and the "Credit Limit Increase Request has been submitted" message will appear. Click on the **Trefoil Logo** to return to the Main Screen.

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

Step 6: To **cancel** the request before saving, click on the **Trefoil Logo** to be directed back to the Main Screen.