

HOW TO SETUP PROMPTING OF CREDIT LIMIT UPON SELECTION OF CUSTOMER?

Overview:

There are 2 Ways to Setup Customer Credit Limit in the System, (1) Thru System Options if it will apply to all Customers and (2) Customer Maintenance if it applies to certain Customer only.

Scenario:

User must be informed if the Customer already exceeded the Credit Limit before proceeding in processing the Sales transaction.

Procedure:

To Setup prompting of Credit Limit upon selection of Customer > Go to Maintenance Tab > System Options > Customers Tab > tick *'Checking on Overdue/Credit Limit after debtor is selected'*

| Customers suppliers sale | ns Purchases Stocks | Report Adjustment C | Options System | | | | | | | |
|---|---|--|--|--|---------------------|--------------------------|------|---|---------------------|--|
| stomer Code Format | AAA-B000 | | | | Payment Not Fully K | nock Off Allow | | | | |
| Checking on Overdue/Cre | lit Limit after debtor is s | selected | Use Global Cre | dit Control | Exclude Outstanding | Sales Order for Credit L | init | Exclude Uninvoice I | 00 for Credit Limit | |
| Credit Limt Credit Limt Additional Credit Limt Vald Unti | 3it Limit after debtor is s 0.00 \$ 0.00 \$ | elected | Use Global Cre 0.00 | dit Control | Exclude Outstanding | Sales Order for Credit L | imt | Exclude Uninvoice I | D0 for Credit Limit | |
| Credit Limit Additional Credit Limit Vald Unti | Jit Limit after debtor is s 0.00 0 0.00 0 | elected Coverdue Limit QT | Use Global Cre 0.00 Add PD Che S0 | Overdue More Than gue to Credit Limit | Exclude Outstanding | Sales Order for Credit L | DN | Exclude Uninvoice f Info INfo INV | DO for Credit Limit | |
| Credit Limit Additional Credit Limit Vaid Unti Enable Control | St Limit after debtor is s | Overdue Limit | Use Global Cre 0.00 Add PD Che S0 | dit Control | Exclude Outstanding | Sales Order for Credit L | DN | Exclude Uninvoice f Info INfo INV | OO for Credit Limit | |
| Credit Limit Additional Credit Limit Vald Unti Enable Control Exceed Credit Limit | Al | Overdue Limit | Use Global Cre 0.00 Add PD Che SO | dit Control C Overdue More Than cque to Credit Limit DO | Exclude Outstanding | Sales Order for Credit L | DN | Exclude Uninvoice D Info Info INV | DO for Credit Limit | |
| Credt Limt Additional Credit Limt Vald Unti Enable Control Exceed Credt Limt Exceed Overdue Lim | Al | velected Coverdue Limit Coverdue Lim | Use Gobal Cre 0.00 Add PD Che SO | tit Control | Exclude Outstanding | Sales Order for Credit L | DN | Exclude Uninvoice D Info INV | OO for Credit Limit | |



On the grid portion, Use the Credit Limit Matrix to enable at which transaction (QT, SO, DO, SINV, CS, DN, INV ARDN or ALL) the system will have the Credit Limit Control Checking.

There are 3 options; Block, No Block, Or Need Password for the transaction to proceed (for further discussion refer to How to Setup Customer Credit Limit Control), once done, click Save.

| i • 2 • | | | | System O | ptions - QNE Optimum | | | | | н - | - 0 | |
|--|---|---------------------------|-------------------|----------------|----------------------|---------------------|---------------------------|-----|---------------------|---------------------|-----|---|
| File Home Info View Save Reset View View Variants Save View Navigation 5 7 × | Tools Inquiry Maintenance | | | | | | | | | | | |
| Sales | System Option General Customers Supplers Sales | Purchases Stocks | Report Adjustment | Options System | | | | | | | | |
| Delivery Orders | ^ | | | | | | | | | | | |
| Sales Invoices Cash Sales | ^ | 44 8000 | | | | | and off them | | | | | |
| Sales Dehit Motes | Customer Code Format Credit Ctonrol | AA-8000 | | | | Payment Not Fully K | nock Off Alow | | | | | - |
| General Ledger Customer | Checking on Overdue/Credit | Limit after debtor is sel | lected | Use Global Cre | edit Control | Exclude Outstanding | Sales Order for Credit Li | mit | Exclude Uninvoice I | DO for Credit Limit | | |
| Jupplier | Credit Limit | 0.00 \$ | Overdue Limit | 0.00 | Overdue More Tha | n 0 🗘 Days | • | | Info | | | 1 |
| 🔌 Sales | Additional Credit Limit Vald Until | 0.00 \$ | | | | | | | | | | |
| 🧭 Purchases | | | | Add PD Ch | eque to Credit Limit | | | | | | | |
| Stocks | | Al | QT | SO | DO | SINV | CS | DN | INV | ARDN | | |
| Advance Currency | Enable Control Exceed Credit Limit Exceed Overdue Limit | Block Block | | | | | | | | | - | |
| Contraction of the second seco | Suspended | | | | | | | | | | v | |
| • vvidx | | | | | | | | | | Windows | | |

Try and create a Quotation for a Customer who reached its Credit Limit and noticed that the system will open the Credit Limit Violation window upon selection of Customer.

| Customer | DO Address Others Notes Files Info | SAMPLE CUSTOMER - Credit Lir | mit Violation — 🗆 🗡 | Rate | | | 1.000000 | 00 Exchange Rat |
|--|--|--|---|--|-------------------------------|-----------|----------|-----------------|
| To Delivery Term Term CLocation | cod. | Credit Limit Details Uutstanding IS + Current - Credit Limit - Additional Credit Limit = Credit Exceeded IS, | | Doc Date Quotation No. Reference No. | 03/18/2020 QT2003/002 e | | | · . |
| Stock Cc Stock Cc | Secondaria Constraints and Con | Additional Credit Limit = 0.00, Credit limit exceeded! Transact | Vaid Unti = 01/01/0001 12:00:00 AM tion can't be saved | Stock Le | cation | WTax Code | WTax | Net |

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