



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

### Overview:

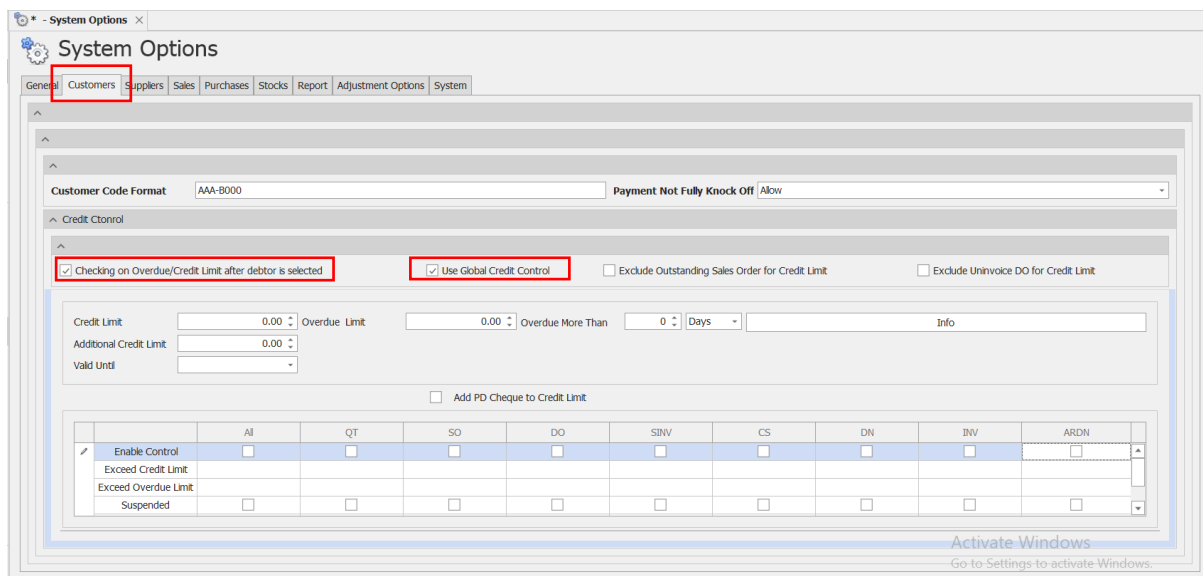
There are 2 Ways to Setup Customer Credit Limit in the System, (1) Thru System Options if it will apply to all Customers and (2) Customer Maintenance if it applies to certain Customer only.

### 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'



**System Options**

General **Customers** Suppliers Sales Purchases Stocks Report Adjustment Options System

Customer Code Format: AAA-B000 Payment Not Fully Knock Off: Allow

**Credit Control**

☒ Checking on Overdue/Credit Limit after debtor is selected ☒ Use Global Credit Control ☐ Exclude Outstanding Sales Order for Credit Limit ☐ Exclude Uninvoice DO for Credit Limit

Credit Limit: 0.00 Overdue Limit: 0.00 Overdue More Than: 0 Days Info

Additional Credit Limit: 0.00 Valid Until:

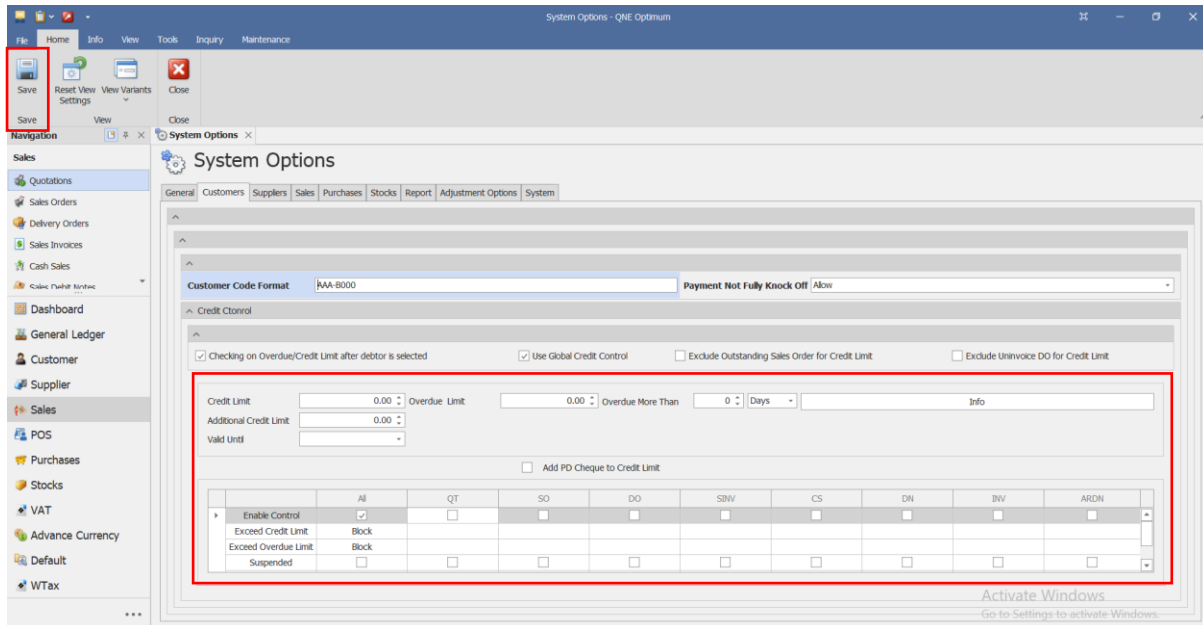
☐ Add PD Cheque to Credit Limit

	All	QT	SO	DO	SINV	CS	DN	INV	ARDN
Enable Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exceed Credit Limit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exceed Overdue Limit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suspended	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activate Windows  
Go to Settings to activate Windows.

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.



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.

