



Title: HOW TO SET CUSTOMER CREDIT LIMIT AND WHEN EXCEEDS CREDIT LIMIT, HOW TO PROMPT A MESSAGE FOR REMIND PURPOSE?

Below is the step on how to set customer credit limit:

Go to Debtor > Debtor accounts

The screenshot shows a software window titled "Debtor" with a "Clear After Save" checkbox. The main form contains the following fields:

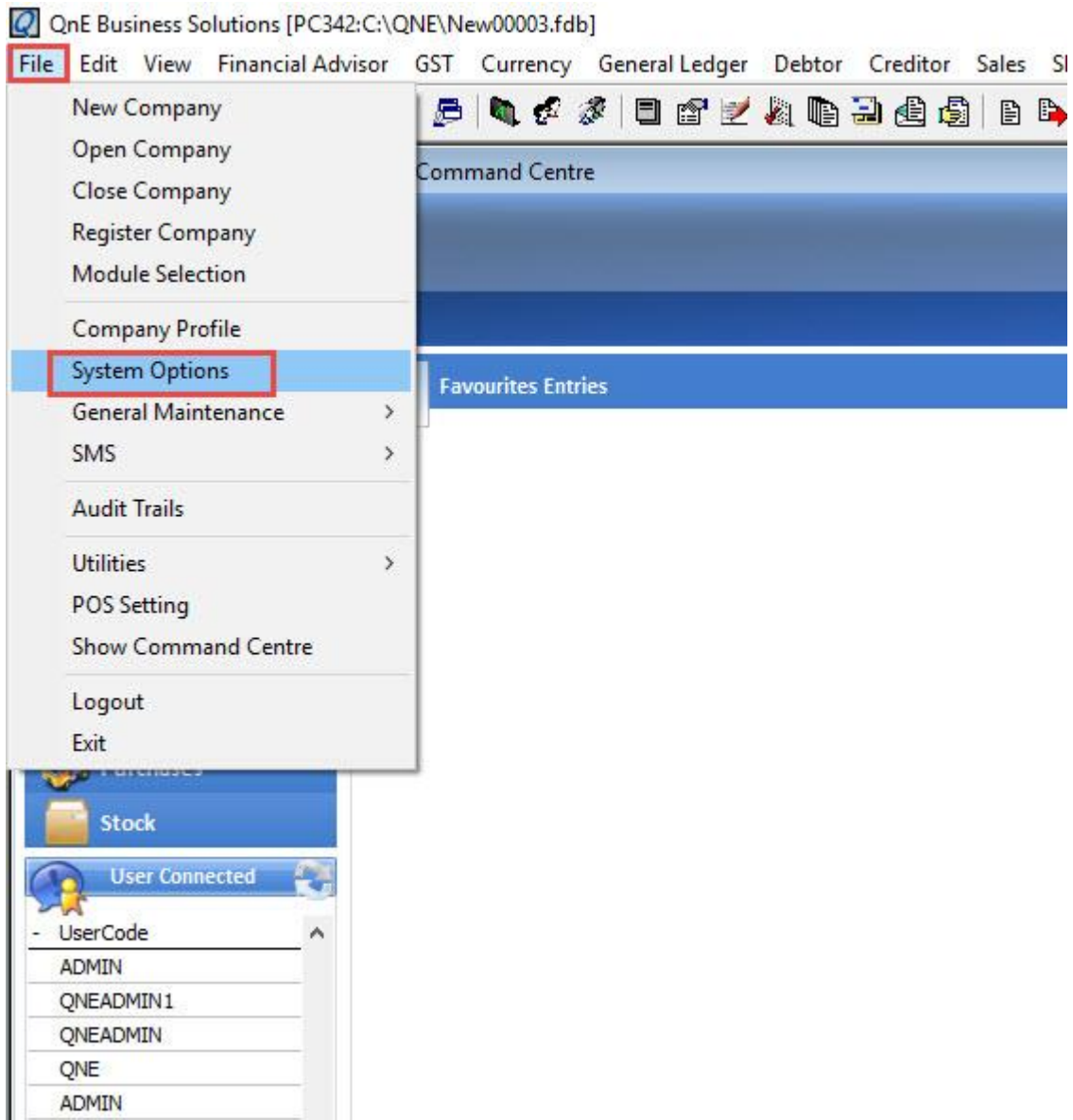
- Debtor Name: ADVANCE TRADING SDN. BHD.
- Debtor Code: 700-A001 (with an "Auto Code" button)
- Category: CORPORATE
- Reg No: 223546-H
- Control Account: 700-0000
- Status: Active
- Acc. Opened: / /
- GST Registration No: (empty)
- Term: C.O.D.
- Currency: RM
- Credit Limit: 100,000 (highlighted with a red box)
- Allow exceed credit limit: (highlighted with a red box)
- Additional Credit Limit: 0.00
- Valid Until: / /
- Balance: 1,440,996.55

Navigation buttons on the right include Previous, Next, Save, Delete, New, and Search. A "Close" button is at the bottom right.



Below are the steps that call out the message:

1. File > System Options





- Go to Sales 2 > Tick "Prompt Warning Message Only If customers Exceed The Credit Limit"
Tick on which screen you want to prompt out the message

System Options

Stock (1) | Stock (2) | Stock (3) | Barcode | Partial Delivery (1) | Partial Delivery (2) | Price Group | Fin. Charges | GST
Search Screens | Audit Trail | User Defined Fields | Premier Features | Productions | WAN Features | Department | Others
General | Doc. Numbering | Debtor | Creditor | Sales (1) | **Sales (2)** | Sales (3) | Sales (4) | Purchases (1) | Purchases (2)

Prompt Warning Message Only If Customers Exceed The Credit Limit

Credit Limit Checking

<input type="checkbox"/> Quotation	<input checked="" type="checkbox"/> Sales Order	<input type="checkbox"/> Delivery Order
<input checked="" type="checkbox"/> Sales Invoice	<input type="checkbox"/> Sales Debit Note	<input type="checkbox"/> Cash Sales

Include Outstanding Sales Order in the Calculations for Credit Limit Checking
 Include Uninvoice DO in the Calculations for Credit Limit Checking

Accounting Posting when Account code not assigned

Automatic apply default interface account code
 Prompt warning message before apply stock posting account/default interface account code
 Prompt error message and abort saving process

Terms Control Checking

Second Level Terms Control : Unsettled Invoices that are over days from due date.
(Unsettled Invoices that are less or equal to 30 days from the due date must with the First level Term Control Right)
(Unsettled Invoices that are more than 30 days from the due date must with the Second level Term Control Right)

<input type="checkbox"/> Quotation	<input type="checkbox"/> Sales Order	<input type="checkbox"/> Delivery Order
<input type="checkbox"/> Sales Invoice	<input type="checkbox"/> Sales Debit Note	<input type="checkbox"/> Cash Sales

Checking on Overdue/Credit Limit after debtor is selected

Apply Save

Close Help



3. This message will prompt when debtors exceeds the credit limit that you already set for them.

Sales Invoice

TO: ADVANCE TRADING SDN. BHD.
ADDRESS: 35, JALAN PINGAI,
TAMAN PELANGI,
80250 JOHOR BAHRU.

SALES INVOICE NO.: INV0112/005
DATE: 31/12/2001
REF. NO.:
OUR DO NO.:
AGENT: CINDY
DELIVERY TERM: Profit Estimator TERM: C.O.D.

#	Stock Code	Description	Project	Department	Serial	Confirm	General Total Point	Location	Acc Code	Sub-Items
	AZ56K-INT	AZTECH 56K INTERNAL MODEM					0.0			<input type="checkbox"/>

Confirm

This debtor exceeds the additional credit limit, do you want to continue saving ?

Credit Limit: 100,000.00
Additional Credit Limit: 0.00 valid until (date not specified)
Current Balance: 1,440,996.55
Uninvoiced DO: 100,927.50
Outstanding SO: 3,675.00
This Invoice: 10,010.00

REFERRAL TOTAL POINTS: 0.0 TOTAL: 10,010.00