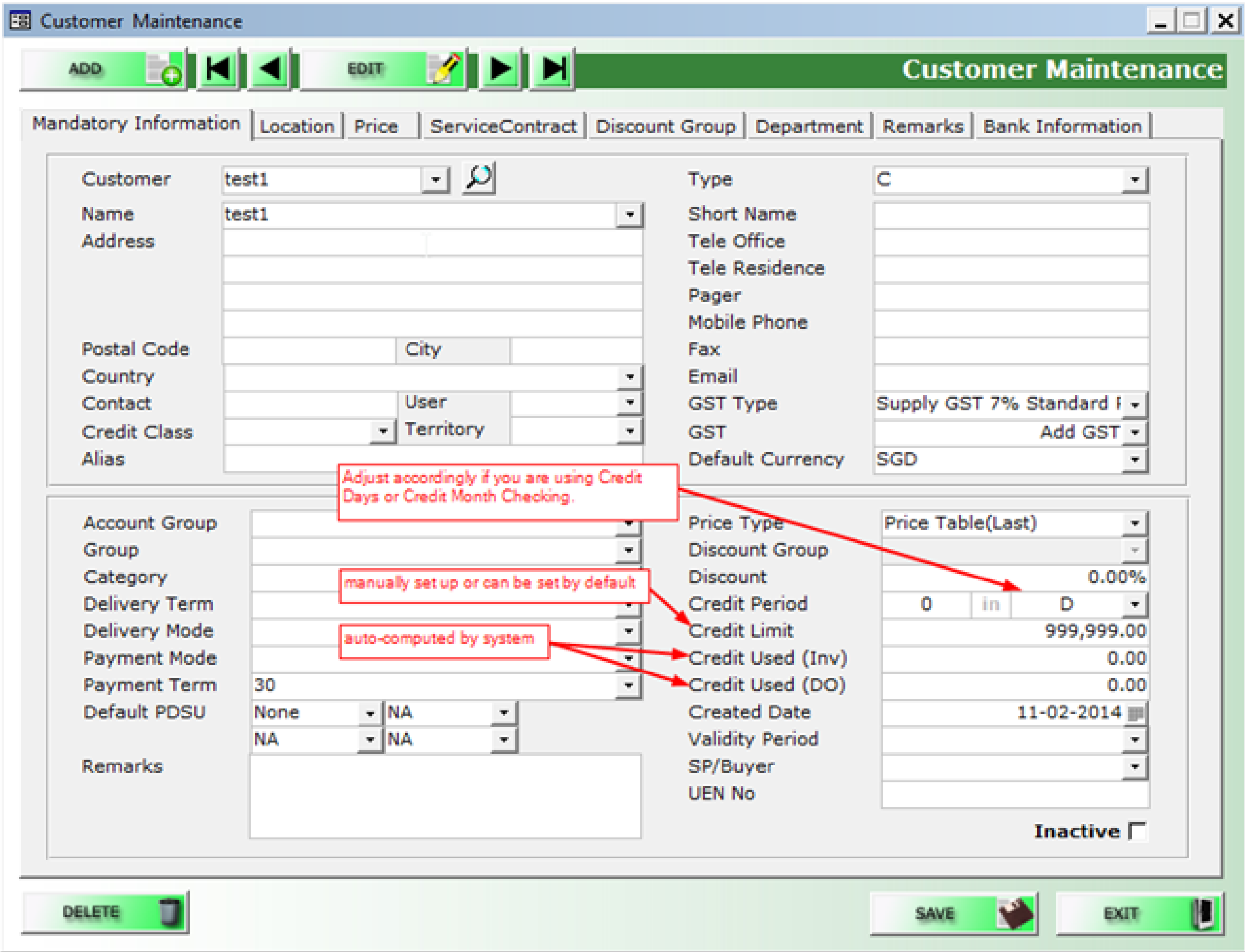
A2000ERP ~ SALES

How to set customer Credit Limit and validation in Sales Order or Invoice to check Credit Limit

Credit Limit and Credit Period Check

Credit Limit and Credit Period are set up in the Customer Maintenance (same applies to Supplier Maintenance but normally not used) as shown below:



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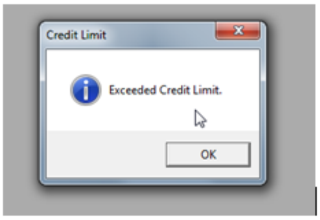
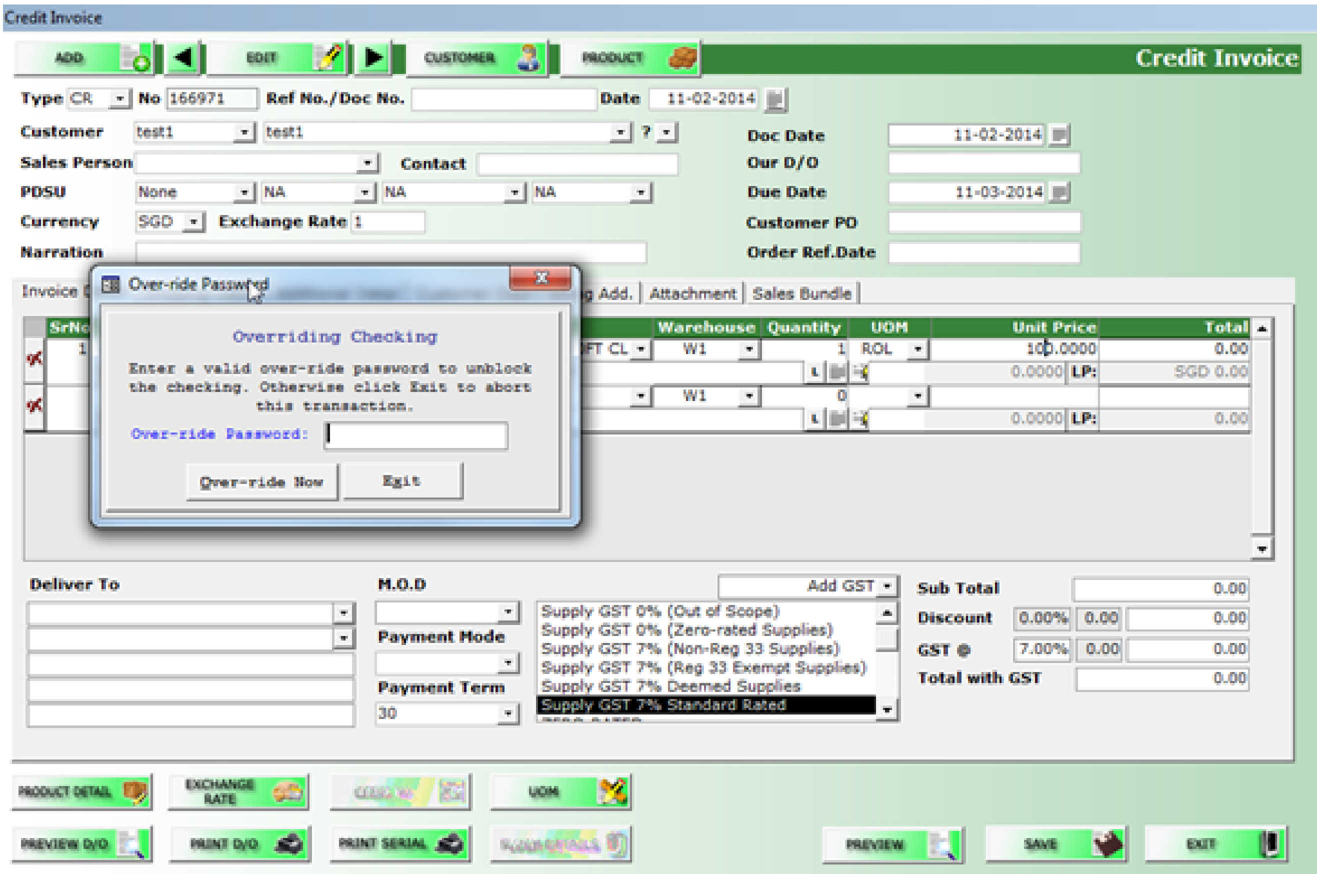
There are two options in the system that relate to Customer Credit Limit Check and both can be found under System Manager – System Settings.

1. System Settings – Main – System Checks and Controls – Check Credit Limit.
   a. Do not check – This is self-explanatory. System does not check credit limit.
   b. Warn Customer – When a transaction is entered which exceeds the remaining credit available to this customer, user will be prompted as follows but will still be able to continue processing the transaction.



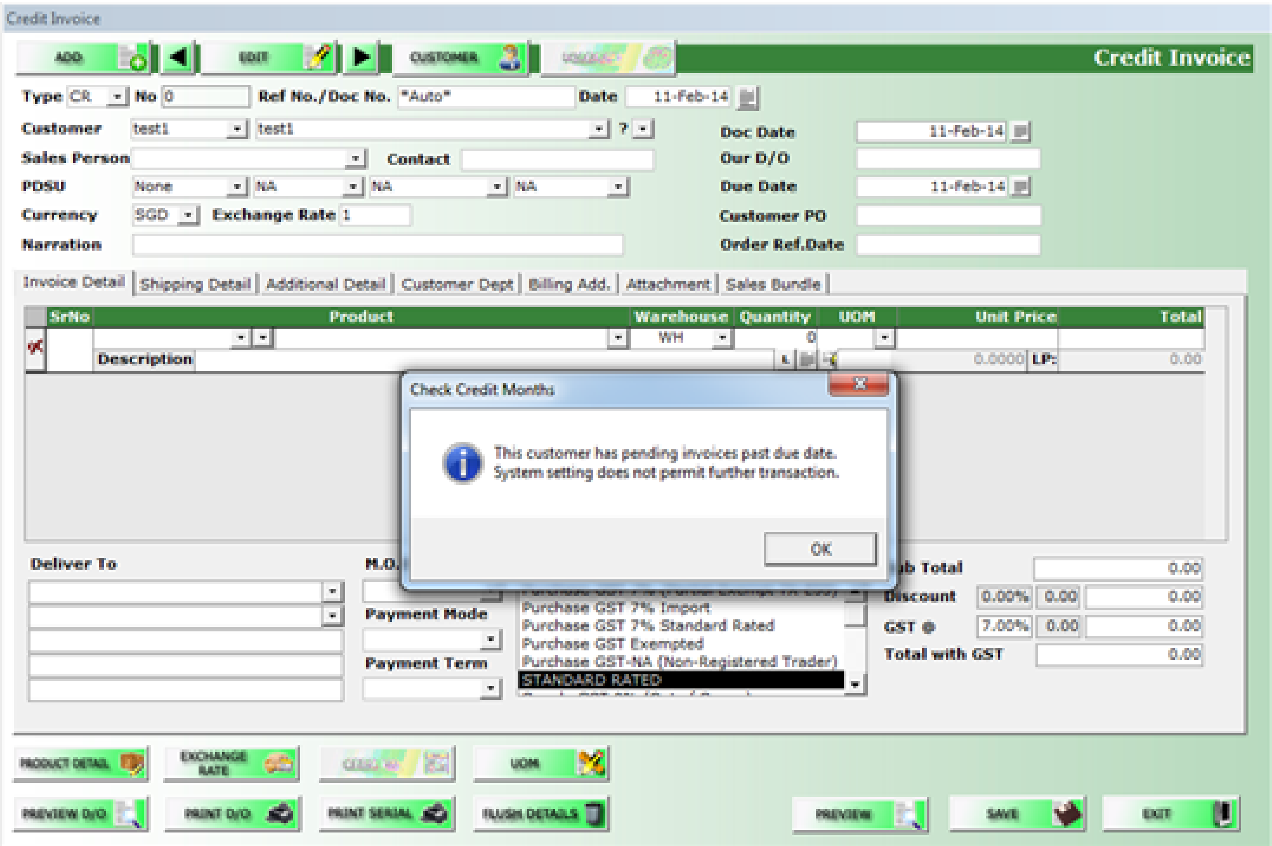
   c. Warn Supplier – same as b.
   d. Both warn – both b and c are applicable.
   e. Block Customer – When a transaction is entered which exceeds the remaining credit available to the customer, user will be blocked from saving the transaction. An over-ride password needs to be keyed in to continue processing the transaction. The prompt appears after the details have been keyed in.



f. Block Supplier – same as e.

g. Both Block – both e and f are applicable.

2. System Settings – Other – Additional Credit Options
   a. Check credit days – if you have set up credit period in days for your Customers and you want the system to block if the customer has credit exceeding the pre-set credit days, tick this option.
   b. Check credit month – if you have set up credit period in month for your Customers and you want the system to block if the customer has credit exceeding the pre-set credit days, tick this option. The blocking will be at the point of selection of the customer in the header.



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