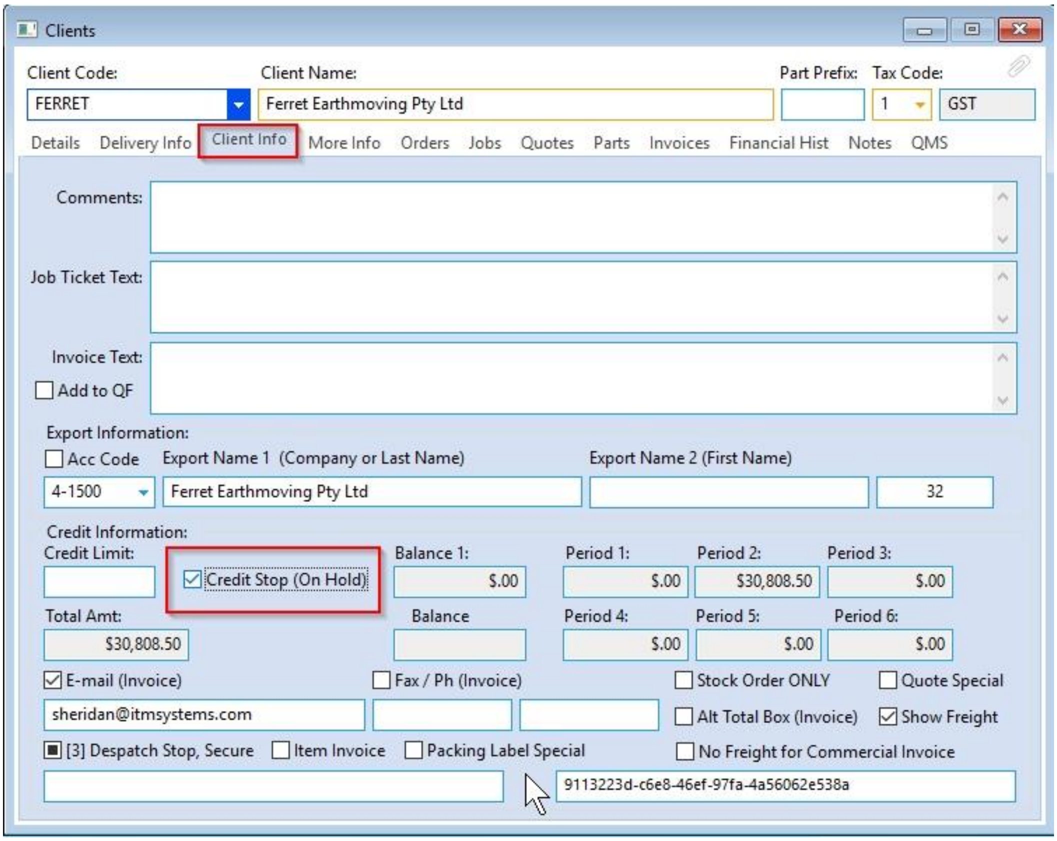
Credit Stop and Credit Limit Functions.

Overview

The ‘Credit Stop’ and ‘Credit Limit’ functions are 2 different functions and are not linked in any way. The Credit Stop function stops new Sales/Factory Orders from being created and also existing orders being despatched. The orders for the client can only be processed when an authorised USER removes the stop function. The Credit Limit function enables the USER to set a limit for sales order in OPTO for that client. When a new order is created it will display the Credit Limit and balance in the bottom left of the window.

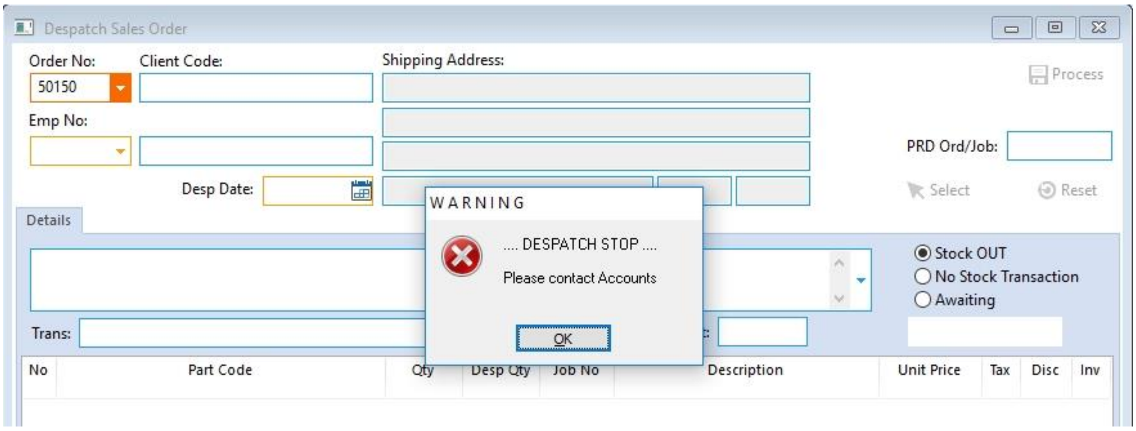
To set the Credit Stop function

On the Opto Ribbon, **click** on the Contacts tab and select New/Edit Clients and open the required Client’s record. **Click** on the “Client Info” tab and **click** in the ‘Credit Stop (On Hold)’ box to tick, and **press** <F9> to save.



Now if an unauthorised USER attempts to create a new Sales/Factory Order, a “Warning – Credit Stop” message pops up. When the USER **click**s on OK, the sales order is blank and will not allow the USER to create an order for that client.

If an unauthorised USER attempts to despatch an existing order for that client, a “STOP” messages pops up. When the USER **click**s on OK, the despatch is blank and will not permit the order for that client to be despatched.

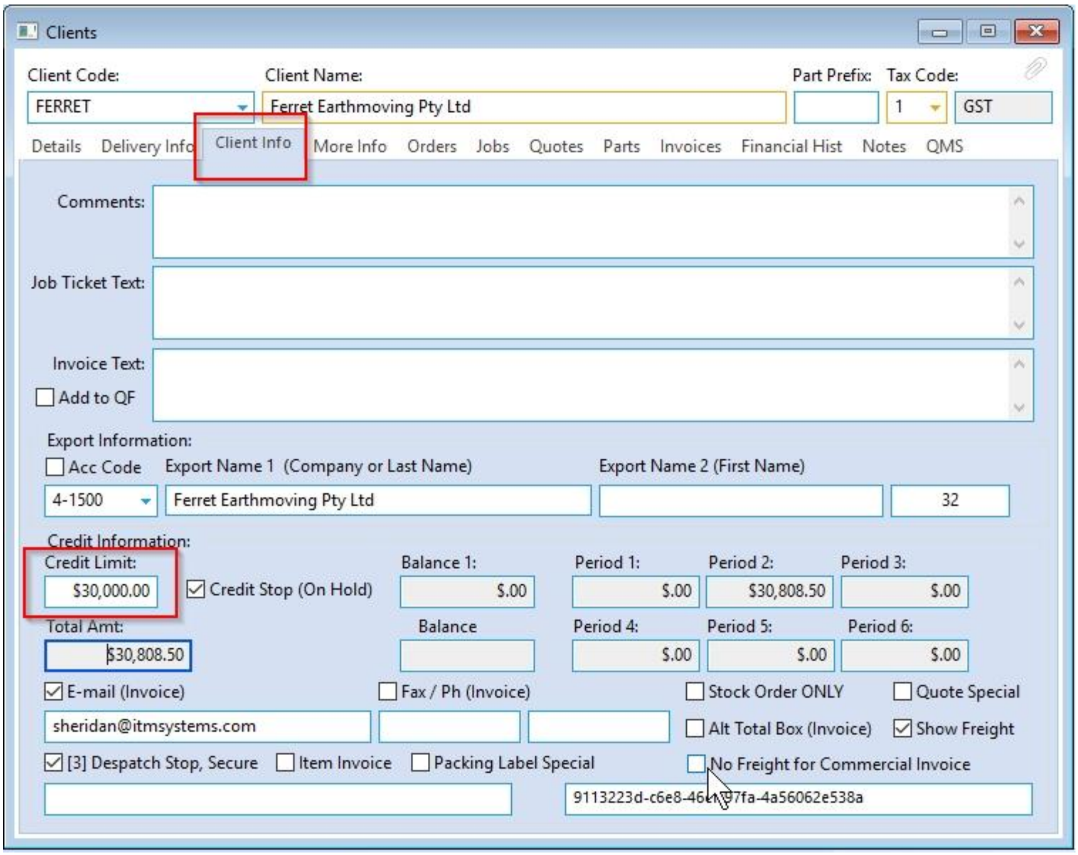


To remove this function

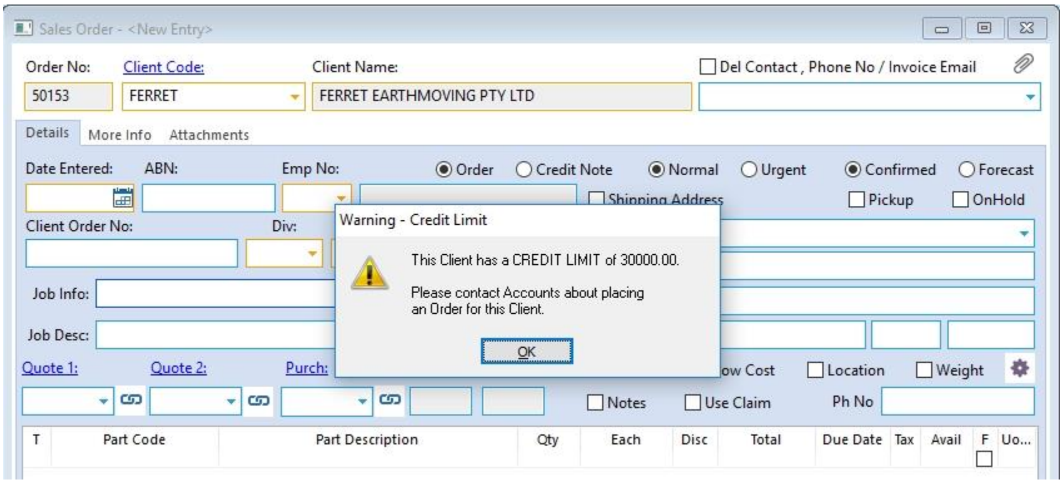
On the ribbon, **click** on the Contacts tab and select New/Edit Clients and open the required Client's record. **Click** on the "Client Info" tab and **click** in the 'Credit Stop (On Hold)' box to un-tick, and **press** <F9> to save. Orders for that client can now be created and despatched as normal.

Applying a Credit Limit to a Client

On the Opto Ribbon, **click** on the Contacts tab and select New/Edit Clients icon and open the required Client's record. **Click** on the "Client Info" tab and **click** in the *'Credit Limit'* field and enter the limit for the client, and **press** <F9> to save.



Now when a USER enters that client's code when creating a Sales/Factory Order, a "Warning – Credit Limit" message appears alerting the USER of that client's credit limit amount. This function <u>does-not</u> stop the order from being despatched and invoiced, it only alerts the USER to the limit. The USER can **click** on <u>OK</u> and continue processing the order.



The Credit Limit and balance appears in the bottom left of the order book window when creating new Sales/Factory orders.