# **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.

E Clients						• 🔀
Client Code:	Client Name:			Part P	refix: Tax Code:	
FERRET	<ul> <li>Ferret Earthmoving Pty L</li> </ul>	.td			1 🚽 GS	T
Details Delivery Info	lient Info More Info Order	s Jobs Quo	tes Parts Inv	oices Financial His	t Notes QMS	
Comments:						^
						4
Job Ticket Text:						~
						÷
Invoice Text:						^
Add to QF						~
Export Information:	Name 1 (Company or Last Nam	ne)	Export Nam	ne 2 (First Name)		
4-1500 • Ferret	Earthmoving Pty Ltd				32	
Credit Information: Credit Limit:	Balance	e 1:	Period 1:	Period 2:	Period 3:	
	redit Stop (On Hold)	\$.00	\$.0	0 \$30,808.50	\$.00	
Total Amt:	Balar	nce	Period 4:	Period 5:	Period 6:	
\$30,808.50			\$.0	0 \$.00	\$.00	
E-mail (Invoice)	🗌 Fax / P	h (Invoice)		Stock Order ONL	/ 🗌 Quote Sp	ecial
sheridan@itmsystems.	com			Alt Total Box (Inve	oice) 🗹 Show Fre	ight
[3] Despatch Stop, Se	ecure 🗌 Item Invoice 📃 Pa	cking Label Sp	ecial	No Freight for Co	mmercial Invoice	
			9113223d-c6e8	-46ef-97fa-4a56062e5	38a	
		N	57 - C			

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 <u>OK</u>, the sales order is blank and will not allow the USER to create an order for that client.

	it couci	Client Name:	Del Contact , Phone No / Invoice Email
i0153 FERI	RET 👻		
etails More Info	Attachments		
ate Entered: A	BN: Em	p No:      Order O Credit Not	te
			Pickup OnHold
lient Order No:	Div:	warning - Credit Stop	8
		This Client has a CREDIT STOP p	placed on them,
ob Info:			
		an Order for this Client.	acing
ob Desc:			

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

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Order No: 50150	Client Code:	Shipping Address:	Proces
Emp No:	-		PRD Ord/Job:
Details	Desp Date:	WARNING	🔭 Select 🕢 🕤 Reset
		EXPATCH STOP Please contact Accounts	Stock OUT     No Stock Transaction     Awaiting
Trans:			

## 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.

L Clients								
Client Code:	Client Name:				Part P	refix: Tax	Code:	
FERRET	Ferret Earthmo	ving Pty Ltd				1	✓ GST	
Details Delivery	nfo Client Info More Info	Orders Jobs C	uotes Parts	Invoices	Financial His	t Notes	QMS	
Comments:								
								4
Job Ticket Text:								1
								~
Invoice Text:								~
Add to QF								
Export Informati	on:							
Acc Code	Export Name 1 (Company or	Last Name)	Export	Name 2 (Fi	rst Name)			_
4-1500 🗸	Ferret Earthmoving Pty Ltd						32	
Credit Informati	on:	Palanca 1	Deried 1	Dev	ind D	Deried 2		
\$30,000.00	Credit Stop (On Hold)	\$.00	Fellou I.	\$.00	\$30,808.50	Fellou 5.	\$.00	
Total Amt:	1	Balance	Period 4:	Per	iod 5:	Period 6:		
\$30,808.	50			\$.00	\$.00		\$.00	
E-mail (Invoid	:e) [	Fax / Ph (Invoice)		🗌 Sto	ck Order ONL	Y 🗌	Quote Spe	cial
sheridan@itms	stems.com			Alt	Total Box (Inv	oice) 🗹	Show Frei	
								ght
[3] Despatch !	Stop, Secure 🔲 Item Invoic	e 🔄 Packing Label	Special	No	Freight for Co	ommercial	Invoice	ght
☑ [3] Despatch !	Stop, Secure 🗌 Item Invoic	e 🗌 Packing Label	Special 9113223d-	C6e8-46eng	Freight for Co 7fa-4a56062e5	ommercial 38a	Invoice	ght

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.

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rder No: <u>Client Code:</u>	Client Name	e:			Del Contact , Pl	ione No / Invoice	Email 🖉
50153 FERRET	✓ FERRET EA	RTHMOVING PT	Y LTD				2
etails More Info Attachme	ents						
ate Entered: ABN:	Emp No:	Order	O Credit Note	Normal	Urgent	Confirmed	O Forecas
				hinning Addres	ş	Pickup	OnHold
lient Order No:	Div: Warning	g - Credit Limit			-	30	
		This Client has	a CREDIT LIMIT of	30000.00.			
lob info:		Please contact	Accounts about pla	cina			
		an Order for thi	s Client.	ion ig			10
ob Desc:			OK				
uote 1: Quote 2:	Purch:				ow Cost	Location	Weight 🔅
• س	• co • c	ם ב	1	otes 🗌 U	se Claim	Ph No	
F Part Code	Part Descrip	tion	Ob I	ach Disc	Total	Due Date Tay /	vail E Llo

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

Sales Order - <new entry=""></new>							
Order No: <u>Client Code:</u> Client Name:				Del Cont	act , Phone No	/ Invoice	Email 🖉
50153 FERRET - FERRET EARTH	IMOVING PTY	LTD					•
Details More Info Attachments							
Date Entered: ABN: Emp No:	Order	O Credit	Note 💿 I	Normal 🔘 Ur	gent 💿 C	onfirmed	⊖ Forecast
18/01/2019 📰 21 252 332 651 1 🔸 Robert	JONES		Shipping	Address	□ P	lickup	OnHold
Client Order No: Div: Sales ID:	Cat(A):	Job Type:	Ferret Earthr	noving Pty Ltd			*
	<b></b>	<b>•</b>	555 West Str	eet			
Job Info:		50					
Job Desc:		*	DARRA			QLD	4112
Quote 1: Quote 2: Purch:	Pre Disc: D	ays:	Use Size	Show Cost	Locatio	n 🗆 V	Weight 🏘
+ 00 + 00 + 00			Notes	Use Claim	Ph No		
T Part Code Part Description	n	Qty	Each	Disc Tota	I Due Dat	e Tax A	vail F Uo
Credit Limit \$30,000.00 Balance \$-180,509.25	Excl TAX:		Т	AX:	In	cl TAX:	
ADD FREIGHT	Curr						