

Override Credit Limit

Software Development RIMSS Business Systems Technology

Company Confidential Copyright ©1983-2017 RIMSS Business Systems Technology Revised 02/10/2017 This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden. The Credit Limit Override feature allows a sale to occur to a Customer even if the sale exceeds the customer's predetermined Credit Limit set in RIMSS. When a customer doesn't have enough Credit available the "Error Code 9" message (Customer over Credit Limit) pops up.

If a user has been granted permission to Override a Credit Limit for a customer who has exceeded the Credit Limit set in RIMSS, the "Error Code 9" message will pop up with an Override button that will allow them to override the credit limit.

File View	Company	Customer	Notes Receivab	le CRM	Supplier	s Employ	ees Pay	roll Bankin	g Fixed Asset	s Inventory	Service Wholegood	ls L	Cattlana ant				_	~
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Customer Name and Address Shipping Information								_		Customer Account		\$285.65						
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Total	\$285.65	\$0.0	0 \$285.65	\$0	.00	\$0.00	\$0.00	\$285.65	\$0.00	\$285.65								
Tax Group	NC MARTIN CO	DUNTY	Rate 8.250	%	SubTo	otal												

If a user does not have permission to Override a Credit Limit for a customer who has exceeded the Credit Limit set in RIMSS, the "Error Code 9" pop-up will have boxes for another user with permission to Override Credit Limits to enter their RIMSS User Name and Password to Override the Credit Limit.

The Customer's Credit limit can be raised or lowered on the detail tab of the Customer Master Record as needed.

File View	Company	Customer N	lotes Receivab	le CRM S	uppliers Em	ployees Pay	roll Banking	g Fixed Assets	Inventory	Service	Wholegood	ds Le					_	×
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Name:	Betty Lou's	Dinner			Err	or Code 9	•		-				Contract in Transit		\$0.00 R	eference		
Address 1:									-				Sales Order Deposit		\$0.00			
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Sub Total	\$263.88	\$0.00	\$263.88	\$0.00	\$0.00	\$0.00	\$263.88	\$0.00	\$263.88									
Tax	\$21.77		\$21.77	\$0.00		\$0.00	\$21.77		\$21.77									
Total	\$285.65	\$0.00	\$285.65	\$0.00	\$0.00	\$0.00	\$285.65	\$0.00	\$285.65									
Tax Group	NC MARTIN CO		Rate 8.250	%	SubTotal													
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To grant the Override Permission go to: File > Manage > Manage Permissions.

In the Permissions Master choose the role that needs the new permission, choose "All" under Functional Area, and choose the Location that you want to grant the permission for from the dropdown boxes. Click Fetch. In the Auto-Filter Row, type *override to find the permission for Overriding Credit Limit on POS Forms. Check the box next to the permission description and click "Save" on the top left to grant the permission to the Role. Users with the Role will need to log out and back in to RIMSS to access this new permission.

RIMSS WinNetStar Permissions Master ×	
Save Print	
Manage View	
Role: Office Manager	
Copy to Company/Locations:	
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▼ Sub Function: Einancial	
I Override Credit Limit on POS Forms	
Override Document Lock	
X M Contains([Permission Description], 'override') -	Edit Filter