



Override Credit Limit

Software Development
RIMSS Business Systems Technology

Company Confidential

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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.

The screenshot displays the RIMSS WinNetStar interface. A 'Warning' dialog box is centered on the screen, indicating a 'Customer over Credit Limit' error (Error Code 9) and providing an 'Override' button. The background shows a 'New Invoice' form for 'Betty Lou's Dinner' with a total of \$285.65. A 'Settlement' window is also open, showing a summary table of the invoice's financial details.

	Taxable	Non-Tax.	Total
SubTotal	\$263.88	\$0.00	\$263.88
Tax	\$21.77		\$21.77
Total	\$285.65	\$0.00	\$285.65

Available Items and Drop Ships			Back Orders			Total			
	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total
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 COUNTY **Rate:** 8.250 % **SubTotal**

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.

The screenshot displays the RIMSS WinNetStar interface. The main window is titled 'New Invoice' and shows various fields for invoice creation, including 'Document Type: Invoice', 'Invoice #: 0', and 'Document Date: 2/8/2017'. The customer information section shows 'Customer Name and Address' for 'Betty Lou's Dinner'. A pop-up dialog box titled 'Warning' with a yellow background and 'Error Code 9' text is overlaid on the customer information. The dialog box contains fields for 'User' and 'Password' and an 'Override' button. To the right, a 'Settlement' window is open, showing a summary of the invoice totals:

	Taxable	Non-Tax.	Total
SubTotal	\$263.88	\$0.00	\$263.88
Tax	\$21.77		\$21.77
Total	\$285.65	\$0.00	\$285.65

Below the settlement window, there are buttons for 'Cash', 'Check', 'Credit Card', 'Customer Account', 'Contract in Transit', 'Sales Order Deposit', and 'Other'. The 'Total' is \$285.65 and 'Change Due' is \$0.00. At the bottom of the settlement window, there are buttons for 'F8 - Save and Print Receipt', 'F9 - Cancel', and 'F10 - Capture Electronic Signature'.

The main invoice window also shows a table of items:

Ass... Part...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price
		Item	CA7132-998	CHAIR	GOODYR	6.0000	\$43.98	\$43.98

At the bottom of the main window, there is a summary table for 'Available Items and Drop Ships' and 'Back Orders'.

	Available Items and Drop Ships			Back Orders			Total		
	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total
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

Below the summary table, there is a 'Tax Group' dropdown set to 'NC MARTIN COUNTY' and a 'Rate' field set to '8.250 %'. A 'SubTotal' button is also present.

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 Location: RIMSS TRUCKS:WILLIAMSTON Fetch

Functional Area: Accounting, Administrative, B... Copy To Company/Locations: Copy

Functional Area Sub Function

Access Level	Permission Description
	*override
	Functional Area: Company
	Sub Function: Financial
<input checked="" type="checkbox"/>	Override Credit Limit on POS Forms
<input type="checkbox"/>	Override Document Lock

Contains([Permission Description], 'override') Edit Filter