



How to add a credit limit.

In this guide I will show you how to add a credit limit to a customer.

1st: Within the dashboard go to the “Customer Overview”, find the customer entry that you’re looking for and open the record.

56 /	ABC Ltd		32 Laker Street	GU14
1605	ABC Promotio...	2 Leeds Road ...	Suite 4-6 Reale...	LS19
930	Absolute Promo...	Crazies Hill	The Old Clubho...	RG10
11619	Absolute Promo...	Southborough	2 Woolley Road	TN4 6
9037	Action Advertising		98 Westoe Road	NE33
5624	Adel Ventures	Dolphin Estate	21 Ibejuleki Str...	
471	Adline Personali...	20 Renfield Street	5th Floor Sterli...	G2 5
296	Advantage Busi...		P O Box 3510	LN12
15038	Advantage Prin...		40 Broadfield R...	S8 0
4262	Adventis Group ...		21 Sussex Close	HP13
2796	AG Products Ltd	Banbury	4-5 North Bar	OX16
320	Aim International	Fox Hill	The Stables	RH16
14	Airdata	SoftSky	Regent House	PO15
943	Allens Printers		Sloper Road	CF11
570	Allparts Kenya	Po Box 46241	Tom Mboya Street	
2029	Amazing Promot...	146b London R...	Promotion House	SS7 5
11031	Anton Office Su...		22 London Street	SP10

2nd: Once the customer file has been opened, within the tab “Company details” There is a tab at the bottom called “Credit Limit”. The default will be set to 0 but you can enter any value needed.

Form fields visible:

- Currency: £
- Feature 2: Make a Selection
- Discount: Make a Selection
- Price Group: Make a Selection
- Fax: [Empty]
- Credit Limit: 0
- Website: [Empty]

3rd: Then click any empty field and then you should be able to save the entry file.