Advanced Credit Limit

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Advanced Credit Limit

Introduction

This Add-on will enable user to restrict generation of the Delivery Note as well as the Sales Invoice, based on the credit limit amount as specified in the Customer Master.

You can also see the bills outstanding details of that particular customer from the voucher entry itself, instead of navigating from **Gateway of Tally** to the customer ledger account outstanding details section.

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Important!

As a best practice it is advisable to take back up your company data

before installing the Add-on

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Setup Guide

1. Activate the Add-on

For Tally.ERP 9 Series A version lower than Release 3.2

Go to **Gateway of Tally > F11: Features > Accounting Features**

Set "Yes" to the options "**Enable Advanced Credit Limit**"

For Tally.ERP 9 Series A Release 3.2 and above

Go to **Gateway of Tally > F11: Features > Add-on Features**

Set "Yes" to the options "**Enable Advanced Credit Limit**"

2. Add-on details with images.

In Tally.ERP 9, Key in the Credit Limits for the Customer Ledger.

Go to **Gateway of Tally** → **Accounting Info** → **Ledger** → **Single Ledger** → **Alter**

Ledger Alteration (Secondary)		ABC Company Ltd
Name : All India Computer Institute		
(alias) :		

			Mailing Details	
Under	: South Debtors		Name	: All India Computer Institute
	(Sundry Debtors)		Address	: All India Add1
				Karnataka
Currency of Ledger	: Rs.			
Pricing Level Applicable	: ☐ Not Applicable			
Maintain balances bill-by-bill	? Yes		State	:
Default Credit Period	: 60 Days		PIN Code	:
Set Credit Limit	: 3,00,000.00 Cr			
Inventory values are affected	? No			
Cost centres are applicable	? No			
Activate Interest Calculation	? No		Tax Information	
			PAN / IT No.	:
Statutory Information			Set/Alter VAT Details ? No	
Is Service Provider/Receiver	? No		Set/Alter Excise Details ? No	
Is TDS Deductable	? No			
Is TCS Applicable	? No			

Opening Balance (on 1-Apr-2007) :	2,500.00 Cr

Figure 1: Ledger Alteration (Secondary)

In Tally.ERP 9, Key in the Transactions

Go to **Gateway of Tally** → **Accounting Vouchers** → **Delivery Note**

As soon as the customer is selected, you can see a popup menu which will show the number of overdue bills, if any, related to that particular customer, as shown below:
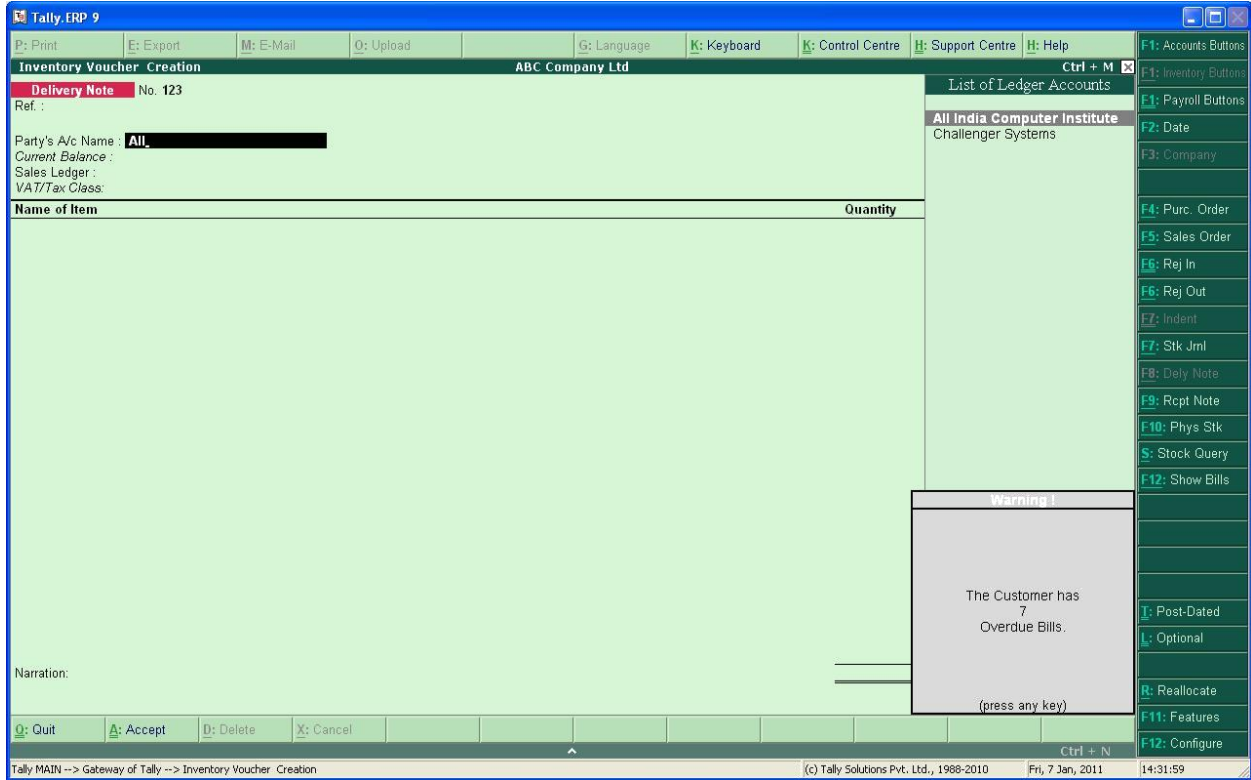

Figure 2: Inventory Voucher Creation

By clicking the **Show Bills** button on the button bar at the creation level of the Delivery note itself, you can see the bills outstanding of that particular customer as shown below:
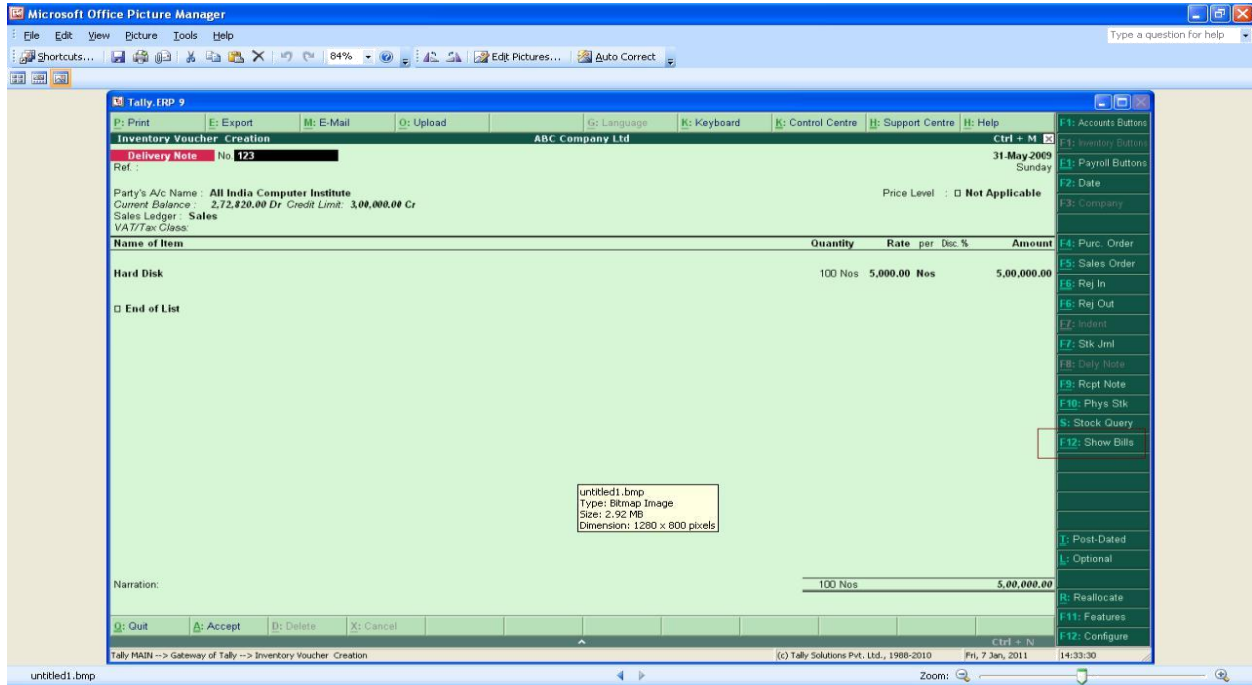

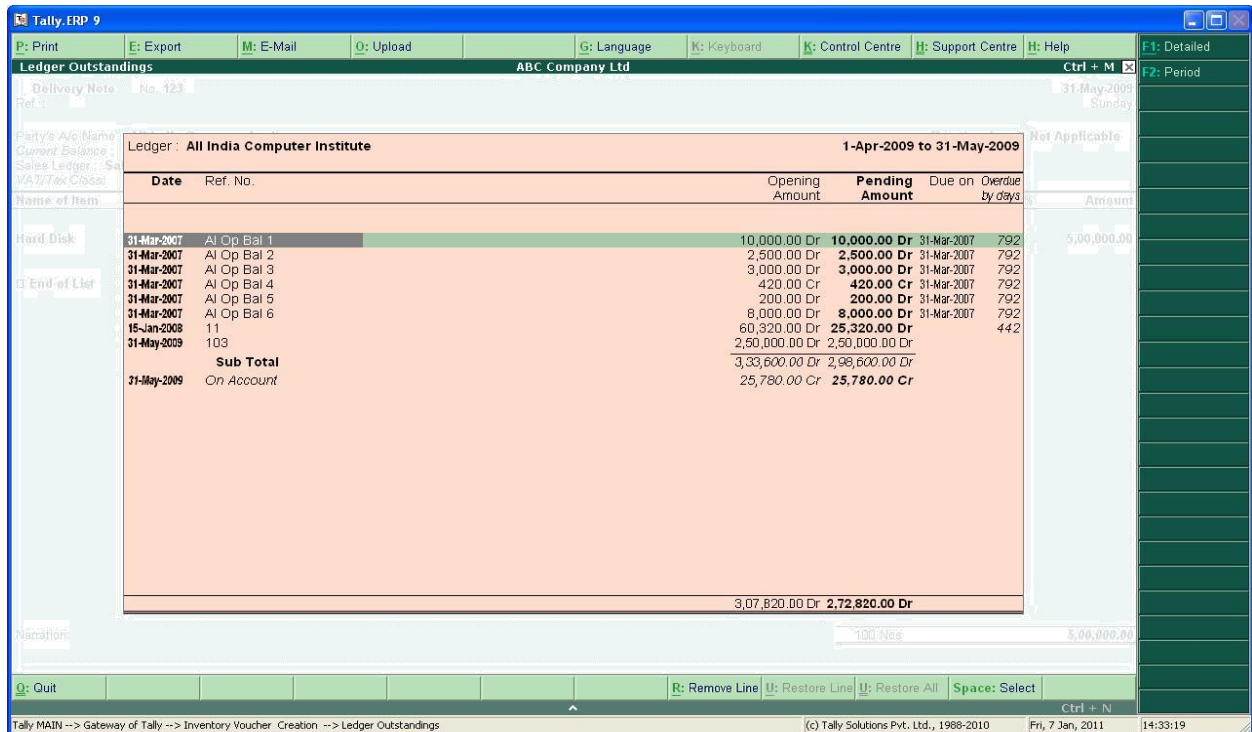Figure 3: Inventory Voucher Creation: Show Bills

Figure 4: Ledger Outstanding

At the time of saving the entry, the credit limit will be verified with the voucher. In case the limit is exceeded, the following popup message is shown and you will not be able to save the voucher.
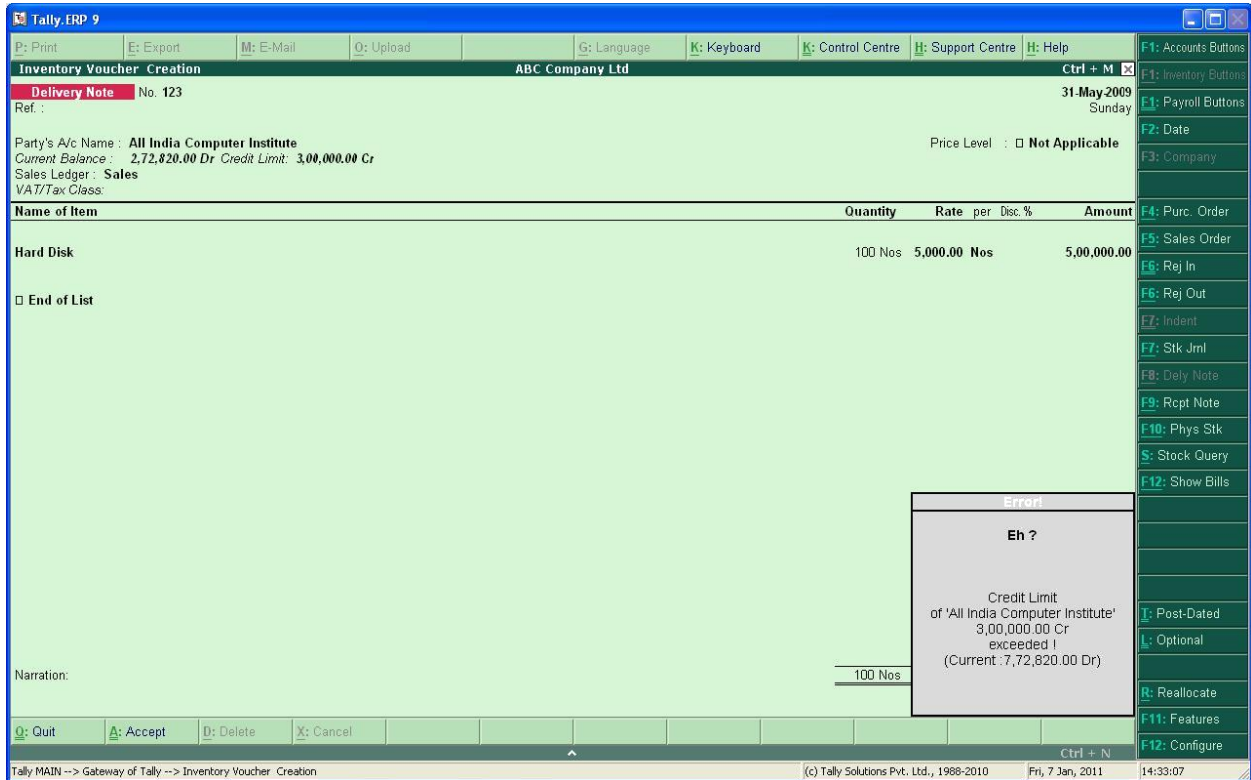

Figure 5: Inventory Voucher Creation

FAQ

Which version/releases of Tally.ERP 9 does the add-on support? This add-on will work only with Tally.ERP 9 Series A, release 3.0 onwards.

How will I get support for this add-on?

For any functional support requirements please do write to us on support@fliksoft.com or Call at +91-73-49-146513

If I need some enhancement / changes to be incorporated for the add-on, whom should I contact?

Please share detailed write-up & screen shots (if any) of your additional requirements over email and we will revert to you within next 24 business hours.

Will new features added be available to us?

We offer one year availability of all support and new features free of cost. After one year, nominal subscription cost will be applicable to you to continue to get free support and updates.

What will happen after one year?

20% of the MRP will be charged in case free support and updates will be required by you.

How to configure the add-ons?

Contact your Tally Partner or Tally Service Partner. Alternatively, visit our website http://www.tallysolutions.com/website/html/solutions/how-to-configure.php where you can find documents on how to configure add-ons.