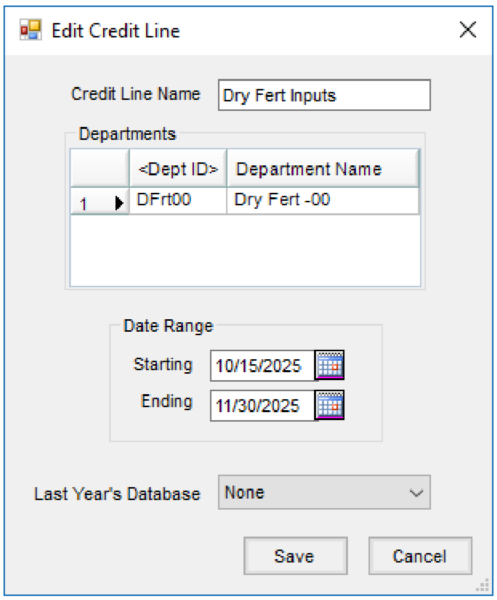
Credit Line

Last Modified on 10/15/2025 3:42 pm CDT

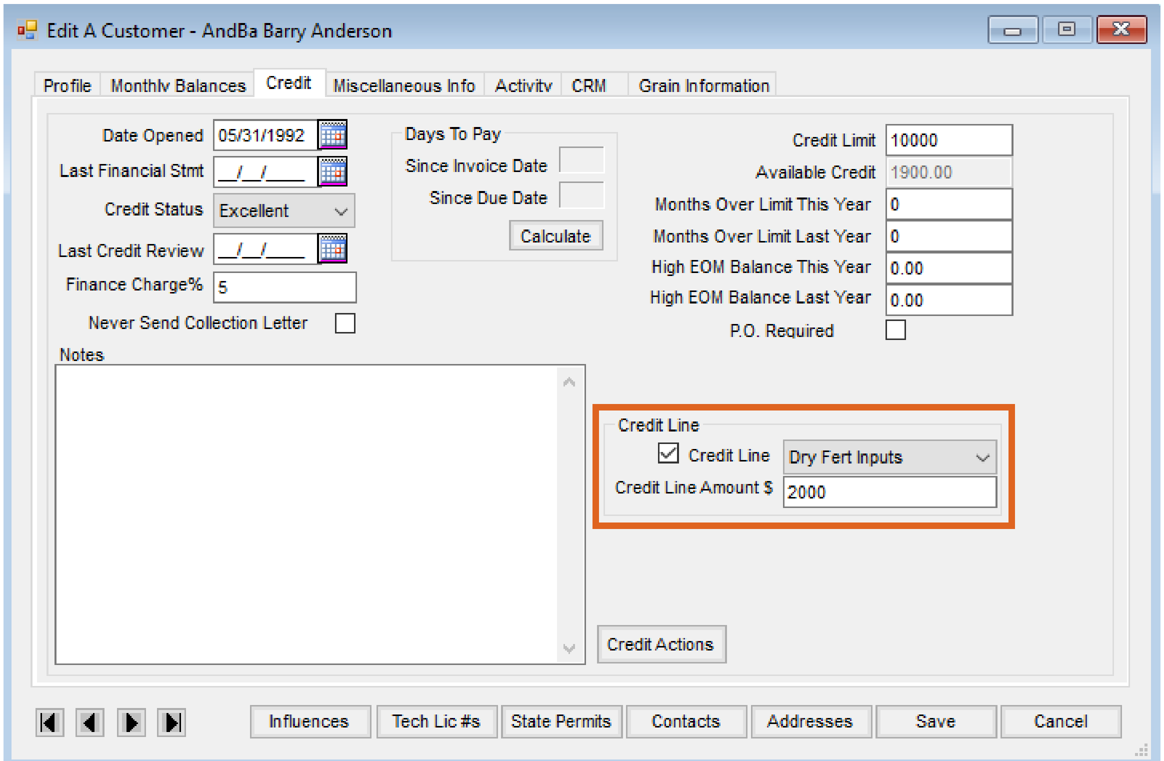
If Customers provide information from their bank or farm credit associations, Credit Lines may be established on the Customer file. To select the Credit Lines, they must first be established at *Setup / A/R / Credit Line*.

Setup

Enter the name of the credit line then double-click *Dept ID* to select the Inventory Department associated with the line of credit. Specify the *Starting* and *Ending* dates for the line of credit. If a prior year's database is to be included in the line of credit calculations, select it in *Last Year's Database*.

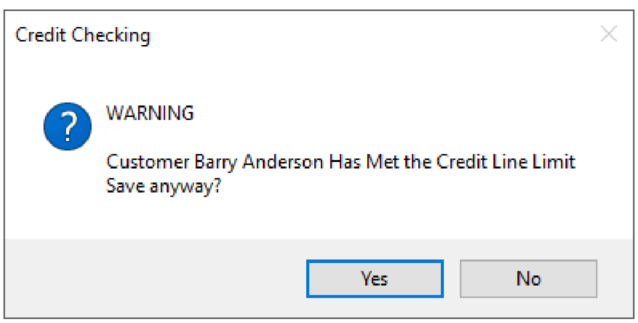


On the Customer's *Credit* tab, check the *Credit Line* option, then select the Credit Line from the drop-down. Enter the *Credit Line Amount $* (limit) and **Save**.



Process

Invoice amounts for Products tied to a Credit Line are tracked. A warning message displays once the Customer has met the limit indicated on the *Credit* tab of the Customer profile.



Use the Current Credit Line Status report (*Accounting Reports / Accounts Receivable / Credit Reports*) to track where Customers stand within their line limit.

Customer Current Credit Line Status

As of 10/15/2025

Customer Name (Cust ID)	Credit Line Name	Starting Limit	Total Used	Limit Available
Anderson, Barry (AndBa)	Dry Fert Inputs	2,000.00	600.00	1,400.00
	Dry Fert Inputs	2,000.00	200.00	1,200.00