

How to Maintain Credit Limit for Customers in SAP

Learn how to maintain credit limit for customers, master data for customer credit management in SAP.

Maintain Credit limit for customers in SAP

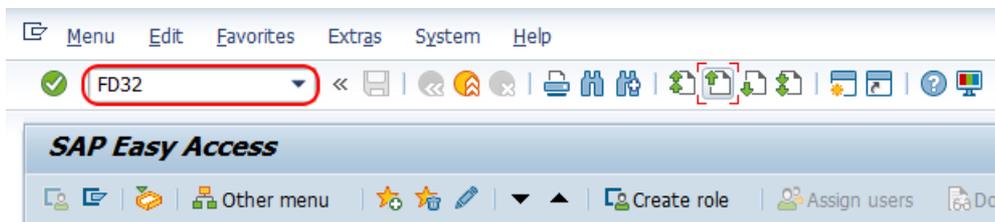
In this activity, you specify the customers for whom the credit limits are to be maintained and specify credit control area of the customers.

Navigation

SAP R/3 Role Menu	Master data for customer credit management
Transaction Code	FD32
SAP Path	SAP Menu => Logistics => Sales and Distribution => Credit Management => Master Data => FD32-Change.

Set credit limit for customer in SAP – Configuration steps

Step 1 : – Execute Tcode “FD32” from SAP easy access screen.



Step 2 : – From the screen, customer credit management change initial screen, enter all the required details [customer number](#), [credit control area](#) and choose all fields of address, central data, status and payment history.

Customer Credit Management Change: Initial Screen

Customer: 500001
 Credit control area: T120 Credit control area TK Software

Overview
 Overview

General data
 Address
 Central data

Credit control area data
 Status
 Payment history

Step 3 : – Choose next screen option (Shift+F1) to go for the next screen of customer credit management screen. From the customer credit management change status screen, update the following details.

- **Credit Limit :** – Specify the credit limit for customers, the amount you in this field enables the maximum credit limit allowed for customer.
- **Risk Category :** – Specify the risk category of the customer.
- **Last interval review :** – Specify the date on which customer credit units are last reviewed
- **Next Interval review :** – Specify the date on which credit limits for customers are going to be review.

Customer Credit Management Change: Status

Customer: 500001 TM Software Solutions
 Credit control area: T120 Credit control area TK Software INR

Credit limit data

Credit limit	90.000,00	Receivables	0,00
Credit account	500001	Special liabil.	0,00
Credit limit used	0,00 €	Sales value	0,00
Credit horizon date		Credit exposure	0,00
A/R Summary		Sec.receivables	0,00

Internal data

Risk category	T02	<input type="checkbox"/> Blocked
Credit rep.group		<input type="checkbox"/> Texts exist
Cust.cred.group		Texts
Customer group		Last int.review
Reference date		Next int.review

External data

Cred.info number		Payment index	
Last ext.review		Rating	
Monitoring		Recmd.Cred.Lim.	

Payment history : –

On customer credit management : payment history screen, the system displays the payment history of customer. You can check all the payment history details in this screen. However we have not done any payment with this customers, so system displays as blank payment details.

The screenshot shows the SAP 'Customer Credit Management Change: Payment history' screen. At the top, there is a title bar with a folder icon and the text 'Customer Credit Management Change: Payment history'. Below the title bar, there are icons for 'Administrative data' and 'Texts...'. The main area contains the following fields:

- Customer: 500001 (highlighted with a red box) TM Software Solutions
- Credit control area: T120 Credit control area TK Software
- Currency: INR

Below these fields is a section titled 'Payment history' containing a table with the following columns: Month, Year, Num..., Total (with cash disc..., Arrear, Total (w/o cash disc..., Arrear. The table is currently empty.

Central Data

From the menu > Goto => Generaldata => Central data.

- **Total Amount** : – Enter the amount that specifies the overall credit limit the customer may receives in all the credit control area.
- **Individual Limit**: – Enter the amount that specifies the maximum credit limit the customer may receives within a credit control area.

The screenshot shows the SAP 'Customer Credit Management Change: Central Data' screen. At the top, there is a title bar with a folder icon and the text 'Customer Credit Management Change: Central Data'. Below the title bar, there are icons for 'Administrative data'. The main area contains the following fields:

- Customer: 500001 TM Software Solutions

Below these fields are three sections:

- Current credit limit assigned**
 - Total amount: 0,00
 - Largest indiv.limit: 0,00
- Maximum permitted credit limits**
 - Total amount: (highlighted with a yellow box)
 - Individual limit: (empty field)
 - Currency: (empty field)
- Last information**
 - Last general info: (empty field)

Click on save button and save the details.

Successfully we have maintained credit limit for customers in [SAP](#).

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SAP SD Enterprise Structure

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↳ SSAP SD - AP SD - Define Division

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↳ SAP SD - Define Company Code

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SAP SD - Assignment of Organizational Units

↳ SAP SD - Assigning a Sales Organization to a Company Code

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SAP SD Customer Master Data

↳ SAP SD - Create customer account groups

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‣ SAP SD - Assign schedule line categories

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