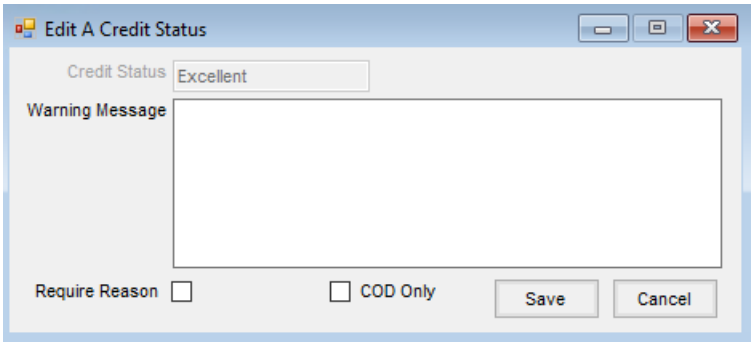
Credit Statuses

Last Modified on 02/05/2024 11:44 am CST

There are five pre-defined statuses at *Hub / Setup / Credit Statuses* that may be assigned to customers: *Excellent*, *Good*, *Fair*, *Poor*, and *Hold*. Add, edit, or delete additional Credit Statuses on this window.

The *Hold* status requires a manager's special password override (which may be acquired from SSI support staff).



- **Credit Status** – Name the status that will be available on the *Credit* tab at *Accounting / File / Open / Customer*.
- **Warning Message** – If a message is saved here, it displays upon saving any sales transactions (Blend Tickets, Delivery Tickets, Invoices, Quick Tickets, Energy Product Delivery Orders, and Energy Tickets in Agvance Mobile Energy) for any Customer with this status.
- **Require Reason** – When checked, bypassing a credit warning requires a reason to be entered that can later be reviewed on the Credit Override Log report found at *Accounting Reports / Accounts Receivable / Credit Reports*.
- **COD Only** – When checked, Invoices must be paid immediately after saving for customers set to this Credit Status. If no payment is taken, the Invoice is automatically voided.