

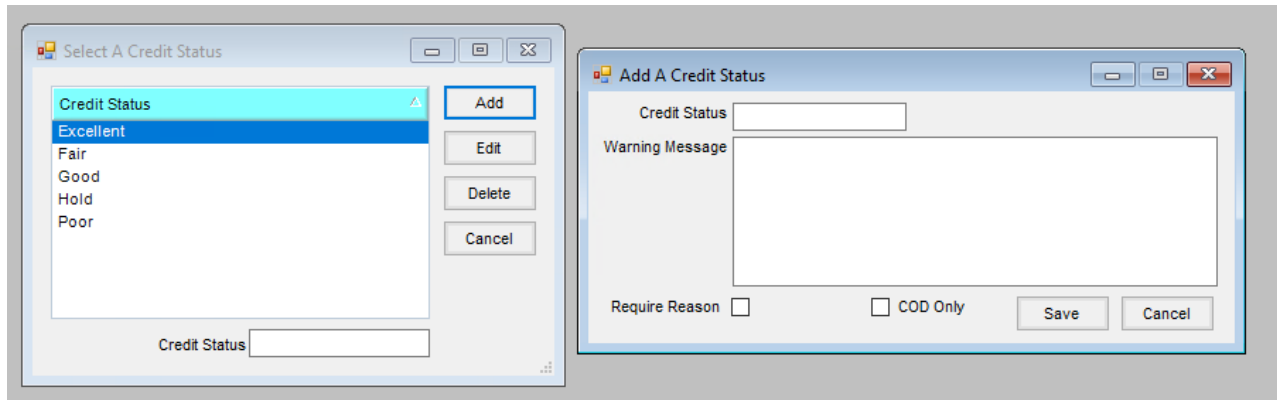
# Using Credit Statuses

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Credit Statuses are a valuable tool which, when put into effect, can help manage special credit situations. It also provides the ability to monitor Credit Status Overrides with the Credit Override Log report.

## Setup

Credit Statuses are set up by selecting **Add** at *Hub / Setup / Credit Statuses*.



1. Enter a *Credit Status* name and type in the *Warning Message*. The warning message will appear when doing any sales transactions (Blend Tickets, Delivery Tickets, Invoices, or Quick Tickets).
2. Optionally check the *Require Reason* checkbox. When checked, if a credit warning is bypassed, it is required to enter a reason that can later be reviewed on the Credit Override Log report.
3. When *COD* is 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.
4. Choose **Save**.

A Credit Status can be applied to Customers on the *Credit* tab at *Accounting / File / Open / Customers*. Choose the *Credit Status* from the drop-down, verify a *Date Opened* is entered, and select **Save**.

Edit A Customer - AndBa Barry Anderson

Profile   Monthlv Balances   **Credit**   Miscellaneous Info   Activitv   CRM   Grain Information

Date Opened 05/31/1992   Days To Pay   Credit Limit 50000  
 Last Financial Stmt   Since Invoice Date   Available Credit 8091.50  
 Credit Status Excellent   Since Due Date   Months Over Limit This Year 0  
 Last Credit Review   Calculate   Months Over Limit Last Year 0  
 Finance Charge% 0   High EOM Balance This Year 0.00  
 Never Send Collection Letter   High EOM Balance Last Year 572.60  
 P.O. Required

Notes

Credit Line  
 Credit Line (None)  
 Credit Line Amount \$ 0

Credit Actions

Influences   Tech Lic #s   State Permits   Contacts   Addresses   Save   Cancel

## Sales Transactions

When processing a Customer with a Credit Status, Agvance will give a warning message. To bypass the message, select **OK** and a *Reason for Credit Status Override* window will appear. This window will only appear if the Credit Status is set to require a reason for override.

Type in the *Reason* for the Credit Status override or select from the drop-down. Choose **Apply**, and then **OK**. The sales transaction can now be processed as normal.

Check Credit Status

**i** Smilo Joe Smith

This account has credit limitations at this time. Please review payment options before continuing.

OK

Reason for Credit Status Override

Cust ID	Reason for Credit Status Override
1   SmiJo	Recent payment received but not yet reflected

Reason Recent payment received but not yet reflected   Apply   OK   Cancel

## Reporting Tools

Credit Status Overrides can be monitored at *Accounting Reports / Accounts Receivable / Credit Reports*. The Credit Override Log records all Credit Overrides. This can be run by *Date Range* and sorted by *User* or *Customer*.

## Credit Override Log

<u>Date</u>	<u>Time</u>	<u>User</u>	<u>Reason for Override</u>
02/20/2026	10:54 am	1RE	Approved by GM
03/05/2026	10:03 am	1RE	Will pay cash on delivery

<u>Transaction Type</u>	<u>Transaction Number</u>	<u>Customer</u>
Invoice	1200899	235879
Delivery Ticket	120000077	236050