



Update Alert! Phase 3 of our multi-phase credit update is released. **This update will now have the credit check on Grid Sample Signups.**

Phase 1 – Released March 5<sup>th</sup> 2020 - Users with the company credit rules permission can check credit, warn, or stop when a blendsheet is created and or modified including an express mix order.

Phase 2 – Released March 21<sup>st</sup> 2020 – Users with the company credit rules permission can check credit on Blender Export, Send to Dispatch, Assign in Dispatch, and marking Ready for Dispatch features.

**NEW FEATURE – Phase 3 - Released April 3<sup>rd</sup> 2020 –** Users with the company credit rules permission can check credit on Grid Sample Signup creation.

This setting is under Settings → Company Database → Credit Settings

Check Credit – If checked it will check credit status.

Check Credit – If unchecked credit status will not be checked.

Warn on failed Credit – If checked a warning will pop up.

Warn on failed Credit – If unchecked credit status will not issue a warning.

Warning Message- This is a spot for you to write your company-specific text or you can continue to use the default.

Hard stop on failed Credit – If checked a blendsheet cannot be created.

Hard stop on failed Credit – If unchecked a blendsheet without created can be created.

Stop Message - This is a spot for you to write your company-specific text.

Notification E-mail – Future phase.

Company Credit Rules - NEW Cooperative

Credit NOT enforced  
 Use Rules Below

Event	Check Credit	Warn on failed credit	Warning Message	Hard stop on failed Credit	Stop Message	Last Updated	Last Updated By	Display Order	Notification Email	IsCoded
Blendsheet Creation / Modification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer does not have credit, do you wish to co	<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input checked="" type="checkbox"/>
Blender Export	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer does not have credit, do you wish to co	<input type="checkbox"/>	Sorry, Customer does not have credit!	03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input checked="" type="checkbox"/>
Send To Dispatch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer does not have Credit, do you wish to co	<input type="checkbox"/>	Sorry, Customer does not have credit!	03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input checked="" type="checkbox"/>
Dispatch Assign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer does not have Credit, do you wish to co	<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input checked="" type="checkbox"/>
Sign Up Creation	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input type="checkbox"/>
Field Service Dashboard	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input type="checkbox"/>
Field/Soil Sample Export/Data E	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input type="checkbox"/>
Dispatch Ready	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer does not have Credit, do you wish to co	<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input checked="" type="checkbox"/>
Rx Output File	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input type="checkbox"/>
Billing Dashboard Account Overn	<input type="checkbox"/>	<input type="checkbox"/>	Account has no Credit in Control	<input type="checkbox"/>	Please choose an Account with Credit	03/20/2020 08:09:45 AM	Patrick Olmstead	1		<input type="checkbox"/>

ReOrder      Update Rules