

CONTRACT

HOLD HISTORY

A customer may be put on **Hold** for a variety of reasons, for example:

- a credit check failure
- exceeding payment terms

The Hold History of a selected Contract may be viewed from the *Contract Listing* screen.

Refer to <u>Place a Contract on Hold</u> and <u>Release a Contract on Hold</u> for more information about placing a Contract on Hold.

Ribbon Access: Contract > Contracts



- 1. The *Contract Listing* screen will be displayed.
- 2. Select the *Site* that you wish to work in.



| ₽ ₹ | | 1 | | Contract Listi | ng - BPO: Versi | on 2.4.0.11 - Exa | mple Compar | ıγ | | | | _ | |
|------------------------|-----|-------------------------------------|--------------------------------|---|---------------------------|-------------------------|---------------------|------------|------------------------------|-------------|-------------|--------|------------|
| Home Equipm | ent | / Locations | Contract F | inance / HR Inventory | Maintenance / P | rojects Manufi | acturing Pro | curement S | ales Servio | e Reporting | Utilities | - | вx |
| Add Edit Delete V | ew | 🔯 Save La 📰 Worksp 🍣 Save Fil | aces ▼ iiio ter iiio | Hold & Release For Ap Suspend & Remove From Release P Approve Contr | Approval Clos Contr | 2 e Reinstațe act | All Sites Active | Fir | nd Serial No. nd Contract | Print Expor | t Reports | | |
| Processing | | . Format | | Status Pro | cessing | 4 | · . / | Current | 4 | Print | Repo | | \Diamond |
| Links # | | | | | | | 1 | | | | | | |
| Enter text to search P | | | | | | | | | | | | | 1 |
| | L | ContractNo | CustomerC. | CustomerName | ContractType | ContractTypeD | Location | OrderNo | StartDate | EndDate | Department | Period | PeriodTyp |
| Functions | ٩ | R <mark>I</mark> C | R C | # 0 0 | R B C | a 🖬 c | R C | REC | = | = | RBC | - | R C A |
| | × | CO000002 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Main | | 01/03/2014 | 03/04/2019 | Sales Depar | 60 | Months |
| Notes | L | CO000003 | DER001 | Derton / Technologies | CPC | Cost Per Copy | Forest Hills | | 01/03/2014 | 01/03/2019 | Sales Depar | 60 | Months |
| | | CO0000004 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Forest Hills | Test Comm | 07/04/2014 | 07/04/2019 | Sales Depar | 60 | Months |
| | L | CO000005 | DER001 | Derton / Technologies | CPC | Cost Per Copy | Forest Hills | ContractOr | 01/03/2014 | 01/03/2019 | Sales Depar | 60 | Months |
| Documents | | CO000006 | OFF001 | Office Supplies Unlimited | CPC | Cost Per Copy | Hilcrest | 1234 | 15/07/2020 | 17/07/2025 | Sales Depar | 60 | Months |
| | | CO000007 | OFF001 | Office Supplies Unlimited | CPC | Cost Per Copy | Forest Hills | | 07/01/2014 | 07/01/2019 | Sales Depar | 60 | Months |
| | | CO000008 | YES001 | Young Electric | CPC | Cost Per Copy | Durban Area | abc123 | 05/02/2019 | 26/11/2020 | Sales Depar | 60 | Months |
| Hold History | | CO000009 | DER001 | Derton / Technologies | CPC | Cost Per Copy | Durban Area | | 07/05/2014 | 07/05/2020 | Sales Depar | 60 | Months |
| | | CO0000010 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | BPO_RSI | | 05/01/2011 | 07/01/2016 | Sales Depar | 60 | Months |
| | | CO0000011 | WES001 | Westwood Dynamic | CPC | Cost Per Copy | Main | ContractOr | 09/05/2014 | 09/05/2019 | Sales Depar | 60 | Months |
| Suspend History | | CO000012 | TIA001 | Titan Group | CPC | Cost Per Copy | Durban Area | | 16/05/2014 | 16/05/2019 | Sales Depar | 60 | Months |
| Suspendinatory | | CO000013 | TIA001 | Titan Group | CPC | Cost Per Copy | Durban Area | | 16/05/2014 | 16/05/2019 | Sales Depar | 60 | Months |
| | | CO000014 | TIA001 | Titan Group | CPC | Cost Per Copy | Main | | 16/05/2014 | 16/05/2019 | Sales Depar | 60 | Months |
| | | CO000015 | TIA001 | Titan Group | CPC | Cost Per Copy | Main | | 20/05/2014 | 20/05/2019 | Sales Depar | 60 | Months |
| | | CO000016 | TIA001 | Titan Group | CPC | Cost Per Copy | Main | | 13/06/2014 | 13/06/2019 | Sales Depar | 60 | Months |
| | | CO0000017 | TIA001 | Titan Group | CPC | Cost Per Copy | Main | | 17/06/2014 | 17/06/2019 | Sales Depar | 60 | Months |
| Processing | | CO000018 | SAM001 | Samanthas Diner | CPC | Cost Per Copy | Main | | 09/07/2014 | 09/07/2019 | Sales Depar | 60 | Months |
| Invoices | | CO000019 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Main | | 28/07/2014 | 28/07/2019 | Sales Depar | 60 | Months |
| Invoices | | CO0000020 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Durban Area | | 01/01/2011 | 31/01/2016 | Sales Depar | 60 | Months |
| | | CO000021 | YES001 | Young Electric | CPC | Cost Per Copy | Main | | 31/07/2014 | 31/07/2019 | Sales Depar | 60 | Months |
| | | CO000022 | SAM001 | Samanthas Diner | CPC | Cost Per Copy | Main | | 05/08/2014 | 05/08/2019 | | 60 | Months |
| Credit Notes | | CO000023 | DER001 | Derton / Technologies | CPC | Cost Per Copy | Kloof | CO1254 | 07/01/2015 | 07/01/2020 | Sales Depar | 60 | Months 7 |

- 1. This screen opens by default in the *Active* status.
- 2. Select a different *status* from the drop-down menu, if required.
 - Notes:
- If the contract you wish to view, is *currently* on Hold, select the *Hold* Status from this menu.



| | | | | Contract List | ing - BPO: Versi | on 2.4 | .0.11 - Exa | mple Compan | iy . | | | | | |
|----------------------|------|-------------|-------------------------------|-----------------------|------------------|----------|--------------|--------------|-----------------|-------------|--------------|-------------|--------|------------|
| Home Equipm | nent | / Locations | Contract Fin | ance / HR Inventory | Maintenance / P | rojects | Manufa | cturing Pro | curement S | ales Servio | e Reporting |) Utilities | - | в× |
| ADY | | 🔯 Save La | ayout 📲 H | old 🚜 Release For A | pproval | | All Sites | - | Find Serial No. | e | n) 💼 | | | |
| | | Worksp | aces 🔻 😽 S | uspend 🚜 Remove From | App | | Active | - < | | | | | | |
| Add Edit Delete V | /iew | Save Fi | iter I R | elease Approve Cont | ract Clos | e act | Status | A StatusDesc | | Print E | xport Report | s | | |
| Processing | | Format | | Status Processin | g | | N | New | | 2 | Repo | | | \Diamond |
| Links A | ٦. | | | | | | R A | Active | 41 | 1 | | | | |
| Enter text to search | | | | | | | н | Hold | | | | 1 | | |
| | | ContractNo | CustomerC | CustomerName | ContractType | Contr F | P | Suspend | StartDate | | EndDate | Department | Period | PeriodType |
| Functions | ٩ | 8 C | a 🖬 c | R E C | R E C | REC | X | Deleted | | - | = | REC | - | REC 🔶 |
| | | CO000028 | HAC001 | Hack PC - IT Shop | CPC | Cost | × | | | 29/06/2015 | 29/06/2020 | Sales Depar | 60 | Months |
| Notes | | CO000029 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Main | | 30/06/2015 | 30/06/2020 | Sales Depar | 60 | Months |
| | | CO000030 | GRE001 | Green Tea Supplies | CPC | Cost | Per Copy | Pinetown | | 20/10/2015 | 20/10/2020 | Sales Depar | 60 | Months |
| | | CO000031 | YES001 | Young Electric | CPC | Cost | Per Copy | Hillcrest | | 24/03/2016 | 24/03/2021 | Sales Depar | 60 | Months |
| Documents | | CO000032 | NOM0001 | Nomu Nivea | CPC | Cost | Per Copy | Hillcrest | | 24/03/2016 | 24/03/2021 | Sales Depar | 60 | Months |
| | | CO000033 | WES001 | Westwood Dynamic | CPC | Cost | Per Copy | Main | | 24/03/2016 | 24/03/2021 | Sales Depar | 60 | Months |
| | | CO000034 | DAN002 | Dancing Shoes | CPC | Cost | Per Copy | Main | | 27/05/2016 | 27/05/2021 | Sales Depar | 60 | Months |
| Hold History | | CO000035 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Kloof | | 22/06/2016 | 22/06/2021 | Sales Depar | 60 | Months |
| | | CO000036 | DAN002 | Dancing Shoes | CPC | Cost | Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | 60 | Months |
| | | CO000037 | JUS001 | Just In Time | CPC | Cost | Per Copy | | | 23/06/2016 | 23/06/2021 | Sales Depar | 60 | Months |
| Surpord History | | CO000038 | SAM001 | Samanthas Diner | CPC | Cost | Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | 60 | Months |
| Suspend history | | CO000039 | TIA001 | Titan Group | CPC | Cost | Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | 60 | Months |
| | | CO0000040 | YES001 | Young Electric | CPC | Cost | Per Copy | Main | | 01/06/2011 | 01/06/2016 | Sales Depar | 60 | Months |
| | | CO0000041 | PAN001 | Panda Copiers | CPC | Cost | Per Copy | Main | | 25/03/2019 | 25/03/2025 | Sales Depar | 60 | Months |
| | Þ | CO0000042 | HOP001 | Hope Works (Pty) Ltd | PRE | Prepa | aid Contract | Main | | 07/09/2016 | 07/09/2021 | Sales Depar | 60 | Months |
| | | CO000043 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Main | | 01/08/2016 | 07/09/2021 | Sales Depar | 60 | Months |
| Processing | | CO0000044 | BOT0001 | Bothas Networking inc | CPC | Cost | Per Copy | Main | | 25/10/2016 | 25/10/2021 | Sales Depar | 60 | Months |
| | | CO000045 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Durban Area | 12345 | 10/05/2017 | 10/05/2022 | Sales Depar | 60 | Months |
| Invoices | | CO0000046 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Upper High | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| | | CO0000047 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Kloof | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| | | CO0000048 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost | Per Copy | Durban Area | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| Credit Notes | 4 | CO0000049 | HOP001 | Hope Works (Ptv) Ltd | CPC | Cost | Per Copy | Durban Area | | 16/05/2017 | 16/05/2022 | Sales Depar | 60 | Months * |
| | | | | | | _ | | | | | | | _ | , |

VIEW HOLD HISTORY

- Select the *row* of the *contract* where you wish to *view* the Hold History.
- 2. Click on the *Hold History* tile.



| \$ = | | | | | | Contract List | ing - BPO: Versi | on 2.4.0.11 - Exa | mple Compa | ny | | | | | |
|-------------|--------------|----------|------|-------------------|-------------------------------|------------------------|------------------|--------------------|--------------|-----------------|--------------|-------------|-------------|----------|------------|
| | Home | e Equi | pmen | nt / Locations | Contract Fir | nance / HR Inventory | Maintenance / P | rojects Manufa | cturing Pro | ocurement 5 | Sales Servic | e Reporting | Utilities | - | 8 × |
| | 1 | V | | Save La | ayout 📲 H | Hold 🔬 Release For A | pproval | All Sites | • | Find Serial No. | | n 💼 | | | |
| | | ~ | | Worksp | aces 🔻 😽 S | Suspend 🚜 Remove From | Approval | Active | - | | | | | | |
| Add | Edit | Delete | Viev | V 🎢 Save Fi | lter 🛛 🖓 F | Release 🏴 Approve Cont | ract Clos | e act 🔇 Refresh | 1 | Find Contract | Print Ex | port Report | s | | |
| | Process | sing | | Format | - | Status Processin | g | | Current | | A Print | " Repo | | | \diamond |
| Links | | | | | | | | | | | | | | | |
| Enter tex | ct to sear | dh | ρ | Drag a column nea | ader here to grou | up by that column | | | | | | | 1 | | 1.1 |
| | | | | ContractNo | CustomerC | CustomerName | ContractType | ContractTypeD | Location | OrderNo | StartDate | EndDate | Department | . Period | PeriodType |
| Funct | tions | | | 9 # 0 C | # B C | R D C | REC | 8 C | 8 0 C | 8 0 C | = | = | REC | = | ROC 1 |
| Note | | | | CO0000028 | HAC001 | Hack PC - IT Shop | CPC | Cost Per Copy | Main | | 29/06/2015 | 29/06/2020 | Sales Depar | . 60 | Months |
| Note | | | | CO000029 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Main | | 30/06/2015 | 30/06/2020 | Sales Depar | . 60 | Months |
| | | 4 | | CO000030 | GRE001 | Green Tea Supplies | CPC | Cost Per Copy | Pinetown | | 20/10/2015 | 20/10/2020 | Sales Depar | . 60 | Months |
| | | | | CO000031 | YES001 | Young Electric | CPC | Cost Per Copy | Hillcrest | | 24/03/2016 | 24/03/2021 | Sales Depar | . 60 | Months |
| Docu | | 1 | | CO000032 | NOM0001 | Nomu Nivea | CPC | Cost Per Copy | Hillcrest | | 24/03/2016 | 24/03/2021 | Sales Depar | . 60 | Months |
| | | 1 | | CO000033 | WES001 | Westwood Dynamic | CPC | Cost Per Copy | Main | | 24/03/2016 | 24/03/2021 | Sales Depar | . 60 | Months |
| | | <u> </u> | 4 | CO000034 | DAN002 | Dancing Shoes | CPC | Cost Per Copy | Main | | 27/05/2016 | 27/05/2021 | Sales Depar | 60 | Months |
| Hold | Hold History | | | CO000035 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Kloof | | 22/06/2016 | 22/06/2021 | Sales Depar | . 60 | Months |
| | | | | CO000036 | DAN002 | Dancing Shoes | CPC | Cost Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | 60 | Months |
| | | | | CO000037 | JUS001 | Just In Time | CPC | Cost Per Copy | | | 23/06/2016 | 23/06/2021 | Sales Depar | . 60 | Months |
| Sus | end Histo | orv | | CO000038 | SAM001 | Samanthas Diner | CPC | Cost Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | . 60 | Months |
| 0.00 | | | | CO000039 | TIA001 | Titan Group | CPC | Cost Per Copy | Main | | 23/06/2016 | 23/06/2021 | Sales Depar | . 60 | Months |
| | | | | CO0000040 | YES001 | Young Electric | CPC | Cost Per Copy | Main | | 01/06/2011 | 01/06/2016 | Sales Depar | 60 | Months |
| | - | | ٦L | CO0000041 | PAN001 | Panda Copiers | CPC | Cost Per Copy | Main | | 25/03/2019 | 25/03/2025 | Sales Depar | . 60 | Months |
| | 1 | | | CO0000042 | HOP001 | Hope Works (Pty) Ltd | PRE | Prepaid Contract | Main | | 07/09/2016 | 07/09/2021 | Sales Depar | . 60 | Months |
| | | | | CO0000043 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Main | | 01/08/2016 | 07/09/2021 | Sales Depar | . 60 | Months |
| Proce | essing | | | CO0000044 | BOT0001 | Bothas Networking inc | CPC | Cost Per Copy | Main | | 25/10/2016 | 25/10/2021 | Sales Depar | 60 | Months |
| | 1 | | 1 | CO0000045 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Durban Area | 12345 | 10/05/2017 | 10/05/2022 | Sales Depar | . 60 | Months |
| Invo | Invoices | | | CO0000046 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Upper High | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| | | | | CO0000047 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Kloof | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| | | | | CO0000048 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Copy | Durban Area | | 16/05/2017 | 16/05/2022 | | 60 | Months |
| Crea | lit Notes | | | CO0000049 | HOP001 | Hope Works (Ptv) Ltd | CPC | Cost Per Copy | Durban Area | | 16/05/2017 | 16/05/2022 | Sales Depar | 60 | Months * |
| | | | | | | | | <u> </u> | | | | | | | |

- 1. The Hold History for Contract No.: [] screen will open.
- 2. Here you can view a historical list of *reasons* why the selected contract has been put on Hold.
- 3. The *Date* the Hold period started and the *Employee* who initiated this Hold period is recorded.
- 4. The *Estimated Release Date* and *actual Release Date* are also captured.
- 5. Click on *Back* to return to the *Contract Listing* screen.





MNU.112.058

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