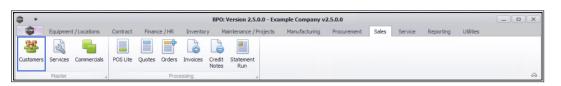


# **SALES**

## **CUSTOMERS - PLACE ON HOLD**

When a customer is placed on hold, <u>you will be able to raise Sales Quotes</u> for the customer. You will <u>not</u> however, be able to raise Sales Orders, Sales Invoices or Calls.

#### Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the customer can be located.
  - The example has *Durban* selected.
- 3. Ensure that the *Status* has been set to *Active*.

Note that only an <u>Active</u> customer can be placed on *Hold*.

- 4. Select the *row* of the *customer* you wish to place on *hold*.
- 5. Click on Hold.

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**Short cut key:** *Right click* to display the *All groups* menu list. Click on *Hold*.



#### Customers - Place on Hold

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		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561
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		LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567
	_	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891
Project History		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567
		BET0001	RE	Betties Summer Shop at t			Durban	0.00		
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		BIG0001	со	Big Bargains			Durban	10,000.00		031 456 7897
		MAN0001	RE	Mandy Norton			Durban	0.00		
		DAN0003	π	Dance Shoes			Durban	0.00		

6. The *Customer on Hold* screen will be displayed.

#### **ON HOLD DETAILS**

- Hold Date and Time: These fields will auto populate with the current date and time.
  - **Date:** Type in or click on the down *arrow* to use the calendar function to select an alternative date if required.
  - **Time:** Type in or use the *arrow indicators* to select an alternative time if required.
- Hold Reason: You will need to type in a reason for placing this customer on Hold.
- Estimated Release Date and Time: These fields will auto populate with the date and time **48 hours** after the Hold date.



- Date: Type in or click on the down *arrow* to use the calendar function to select an alternative date if required.
- **Time:** Type in or use the *arrow indicators* to select an alternative time if required.
- **Employee:** This will auto populate with the person currently logged on to the system. You can click on the down *arrow* to select an alternative employee if required.

#### **SAVE DETAILS**

7. When you have finished adding details to this screen, click on *Save*.

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- 8. When you receive the *Customer Processing* message to confirm that;
  - Customer No: [customer code] has been placed on hold.
- 9. Click on *OK*.



#### Customers - Place on Hold

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## **VIEW CUSTOMER ON HOLD**

- 1. From the *Customer Listing* screen,
- 2. Change the *Status* to *Hold*.
- 3. Note the customer you have placed on hold.



## Customers - Place on Hold

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#### **Related Topics**

Release from Hold

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