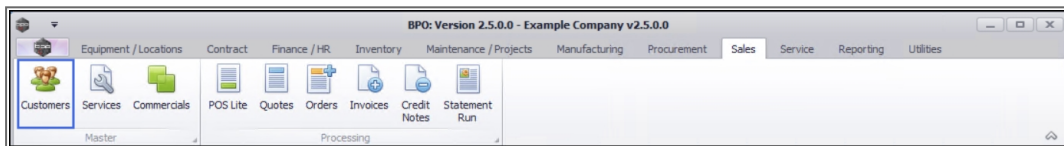


# SALES

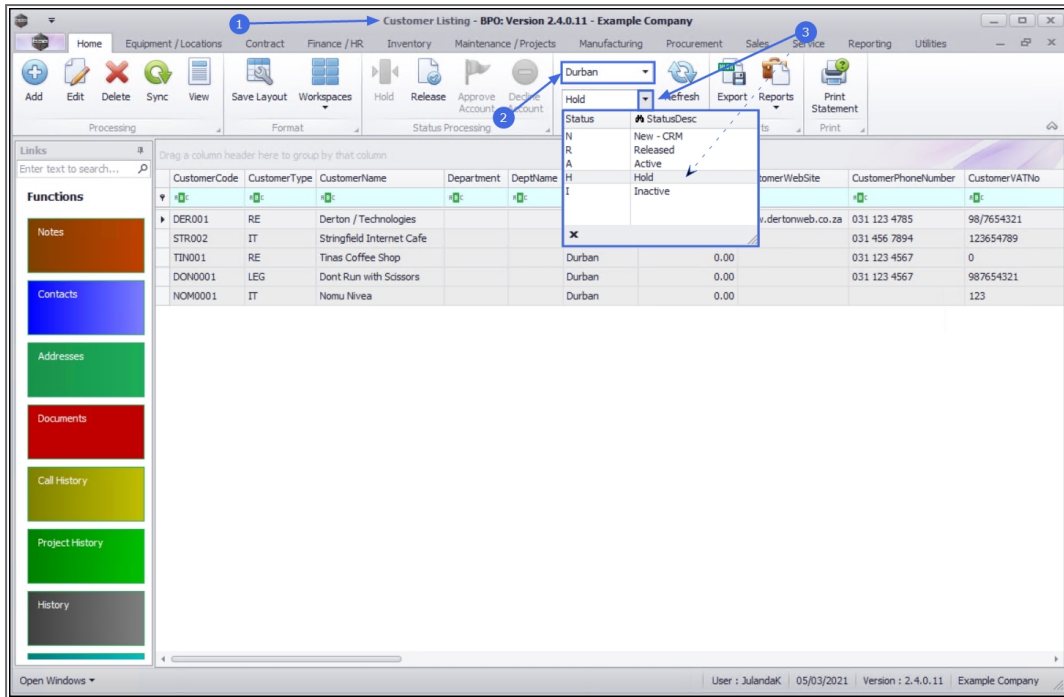
## CUSTOMERS – RELEASE FROM HOLD

A Customer can be Released from Hold when the Hold requirements have been met.

**Ribbon Access:** *Sales > Customers*



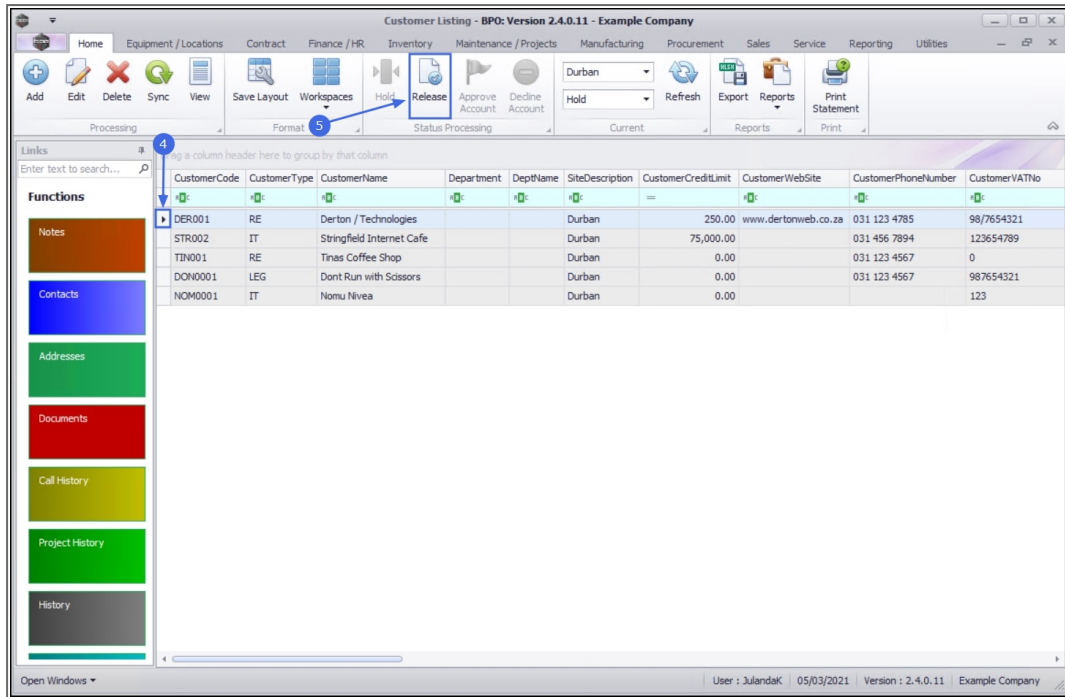
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer on hold can be located.
  - The example has **Durban** selected.
3. Change the **Status** by clicking on the down **arrow** to display the status drop-down **menu**.
  - Click on the **Hold** status.



4. Click on the **row** of the **customer** you wish to **release** from Hold.
5. Click on **Release**.



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

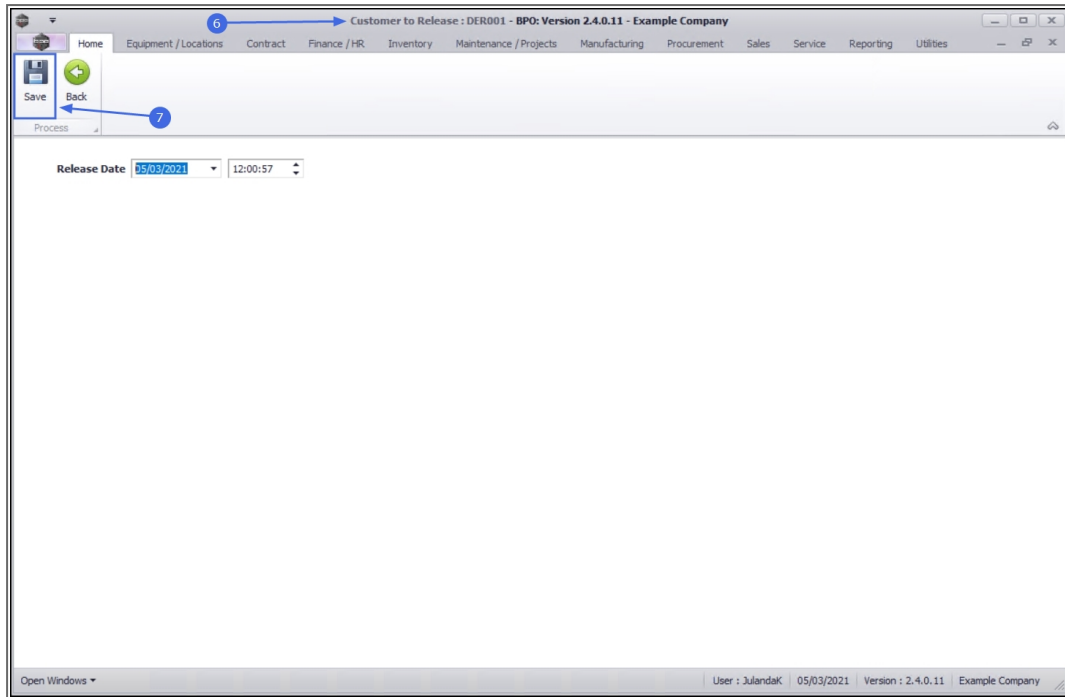


6. The **Customer to Release: [customer code]** screen will be displayed.

## ADD RELEASE DETAILS

- The **Release Date and Time** will auto populate but these can be changed according to your requirements:
  - **Date:** Type in or click on the down **arrow** and 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.

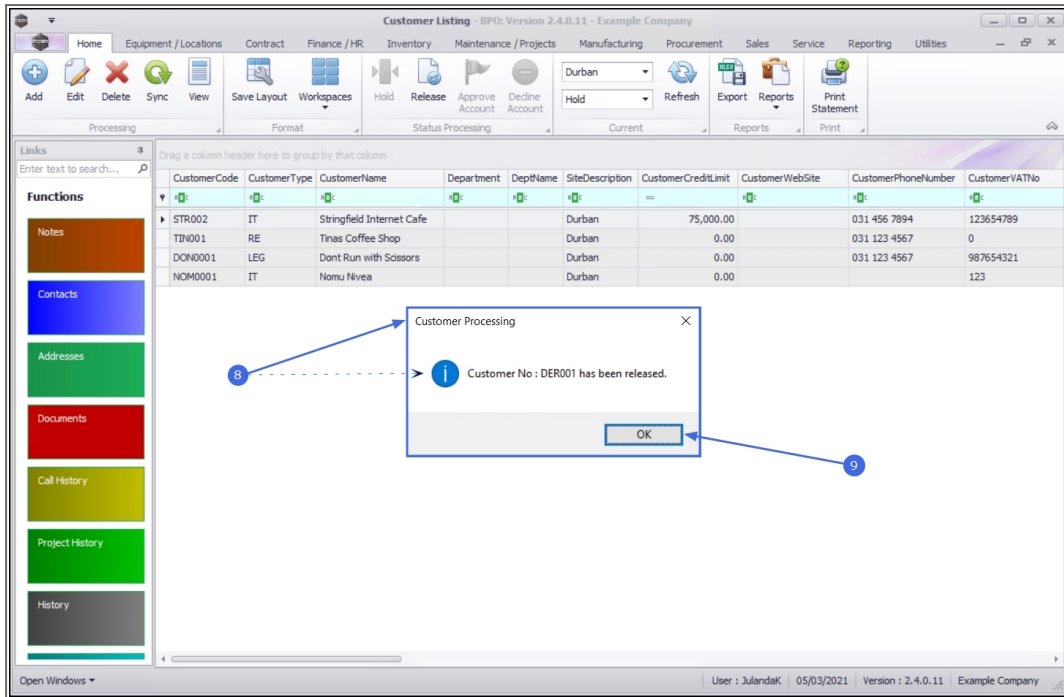
7. Click on **Save**.



8. When you receive the **Customer Processing** message informing you that;

- **Customer No: [customer code] has been released.**

9. Click on **OK**.



## VIEW RELEASED/RE-ACTIVATED CUSTOMER

1. To view the customer in the *Customer Listing* screen,
2. Change the *Status* to *Active*.

**Customer Listing - BPO: Version 2.4.0.11 - Example Company**

Navigation: Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities

Processing: Add, Edit, Delete, Sync, View, Save Layout, Workspaces, Hold, Release, Approve Account, Decline Account

Status Processing: Active, Refresh, Export, Reports, Print Statement

Links: Enter text to search...

Functions: Notes, Contacts, Addresses, Documents, Call History, Project History, History

CustomerCode	CustomerType	CustomerName	Department	DeptName	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
CUS001	RE	Cash Sales Account				000 000 0000	0000000000
HOP001	RE	Hope Works (Pty) Ltd			www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies		Durban	250.00 www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited		Durban	75,000,000.00 www.cnn.co.za	031 789 4561	987456321
YES001	CO	Young Electric		Durban	100,000.00	0825555555	2314687641
WES001	RE	Westwood Dynamic		Durban	10,000,000.00 www.web.co.za	031 789 4561	123456789
TIA001	RE	Titan Group		Durban	100,000.00 www.web.co.za	031 852 9632	123258741369
BOT0001	IT	Bothas Networking Inc		Durban	50,000.00 www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner		Durban	45,000.00 www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe		Durban	75,000.00	031 785 4785	123654789
PAN001	RE	Panda Copiers		Durban	50,000.00	031 123 4567	123456789
HAC001	IT	Hack PC - IT Shop		Durban	0.00	031 789 4561	6654357155
PIN001	GV	Pink Shoes		Durban	0.00	031 456 7894	1234
HIL000001	HILLCRESTP	Mary Contrary		Durban	0.00	083 559	00000
JUS001	RE	Just In Time		Durban	50,000.00 www.justintime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey		Durban	0.00 www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies		Durban	75,000.00	031 456 7891	123456789
FIN0001	RE	Fine Hair Salon		Durban	0.00 www.finehair.co.za	031 123 4567	1234
BET0001	RE	Bettes Summer Shop at L...		Durban	0.00		1234
biancad	RE	North West Branch		Durban	0.00		0
DAN002	IT	Dancing Shoes		Durban	10,000.00	031 123 4567	123456789
BIG0001	CO	Big Bargains		Durban	10,000.00	031 456 7897	123456789
MAN0001	RE	Mandy Norton		Durban	0.00		0

Status Dropdown: Active, Refresh, Export, Reports, Print Statement

Status List: Status, StatusDesc, N New - CRM, R Released, A Active, H Hold, I Inactive

User: JulandaK | 05/03/2021 | Version: 2.4.0.11 | Example Company

MNU.061.013