

# **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.



### Customers - Release from Hold

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- 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*.



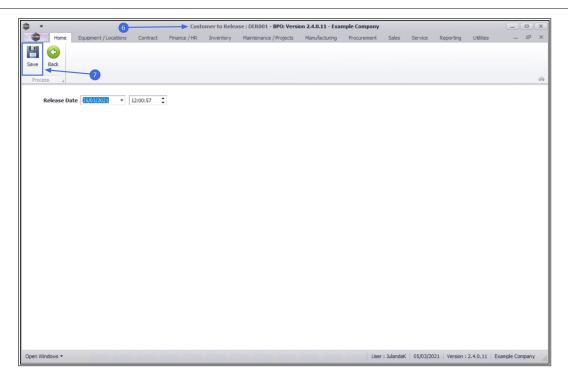
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6. The *Customer to Release: [customer code]* screen will be displayed.

#### **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*.



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## **VIEW RELEASED/RE-ACTIVATED CUSTOMER**

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



### Customers - Release from Hold

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		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
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		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
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		SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
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		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
Project History		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
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		MAN0001	RE	Mandy Norton			Durban	0.00			0

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