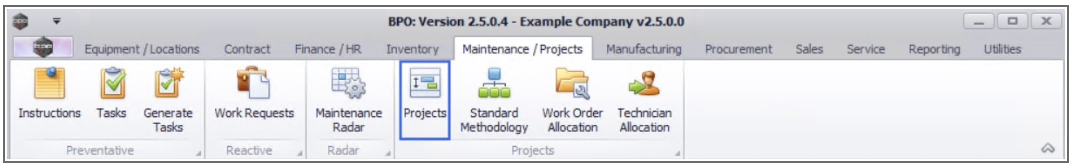
SALES

CUSTOMERS - HOLD HISTORY

The **Hold History** for the Customer can be accessed from the ***Customer Maintenance*** screen.

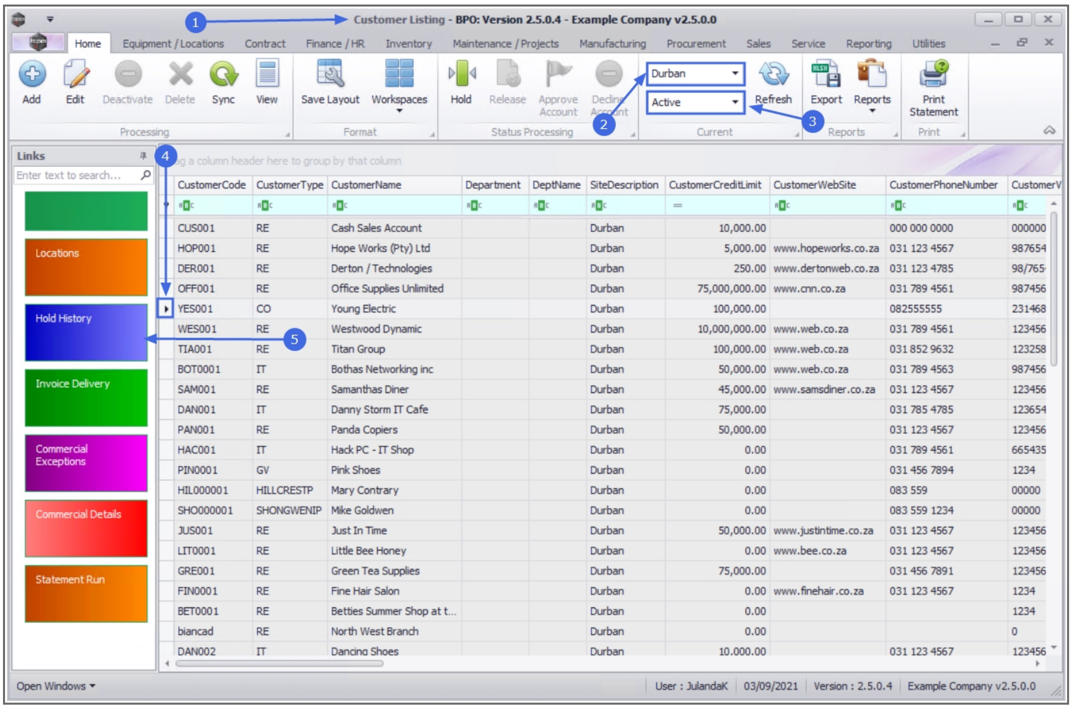
Ribbon Access: *Sales > Customers*



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

> You can view the hold history details for a customer in any status.

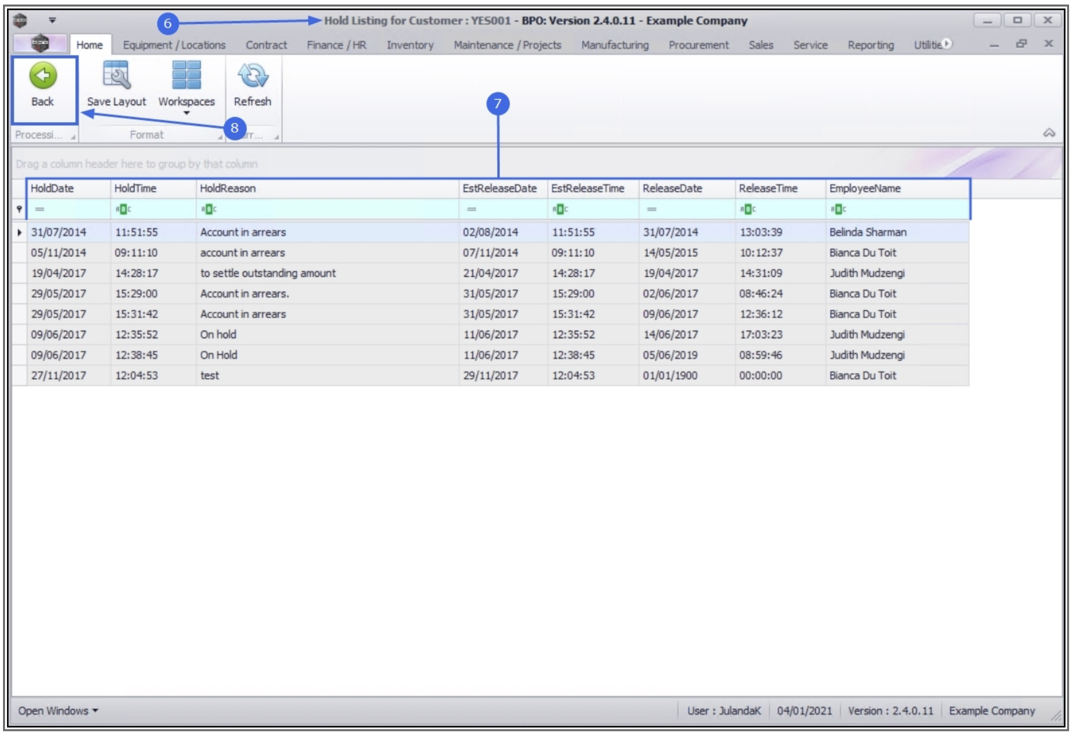
4. Click on the ***row*** of the ***customer*** whose Hold History details you wish to view.
5. Click on the ***Hold History*** tile.



6. The ***Hold Listing for Customer: [customer code]*** screen will be displayed.

> The Hold History for the Customer can only be viewed from the Hold Listing screen and no changes can be made to the information.

7. The Hold History is automatically generated when the Customer is ***Placed on Hold*** or ***Released from Hold***.
8. Click on ***Back*** to return to the ***Customer Maintenance*** screen


Hold Listing for Customer : YES001 - BPO: Version 2.4.0.11 - Example Company
Home
Equipment / Locations
Contract
Finance / HR
Inventory
Maintenance / Projects
Manufacturing
Procurement
Sales
Service
Reporting
Back
Save Layout
Workspaces
Refresh
Format
6
7
8
HoldDate HoldTime HoldReason EstReleaseDate EstReleaseTime ReleaseDate ReleaseTime EmployeeName
31/07/2014 11:51:55 Account in arrears 02/08/2014 11:51:55 31/07/2014 13:03:39 Belinda Sharman
05/11/2014 09:11:10 account in arrears 07/11/2014 09:11:10 14/05/2015 10:12:37 Bianca Du Toit
19/04/2017 14:28:17 to settle outstanding amount 21/04/2017 14:28:17 19/04/2017 14:31:09 Judith Mudzengi
29/05/2017 15:29:00 Account in arrears. 31/05/2017 15:29:00 02/06/2017 08:46:24 Bianca Du Toit
29/05/2017 15:31:42 Account in arrears 31/05/2017 15:31:42 09/06/2017 12:36:12 Bianca Du Toit
09/06/2017 12:35:52 On hold 11/06/2017 12:35:52 14/06/2017 17:03:23 Judith Mudzengi
09/06/2017 12:38:45 On Hold 11/06/2017 12:38:45 05/06/2019 08:59:46 Judith Mudzengi
27/11/2017 12:04:53 test 29/11/2017 12:04:53 01/01/1900 00:00:00 Bianca Du Toit
Open Windows
User : JulandaK
04/01/2021
Version : 2.4.0.11
Example Company

MNU.061.024