

We are currently updating our site; thank you for your patience.

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		
		biancad	RE	North West Branch			Durban	0.00		
History		DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567
		BIG0001	CO	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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