

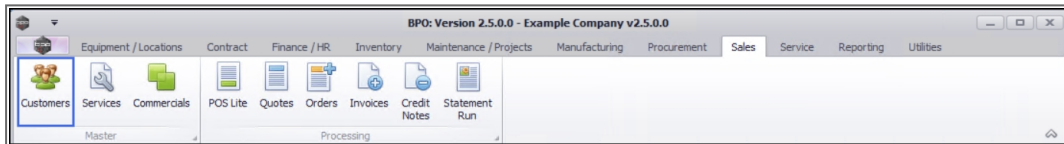
We are currently updating our site; thank you for your patience.

## SALES

### CUSTOMERS – PLACE ON HOLD

When a customer is placed on hold, you will be able to raise Sales Quotes for the customer. You will not 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**.

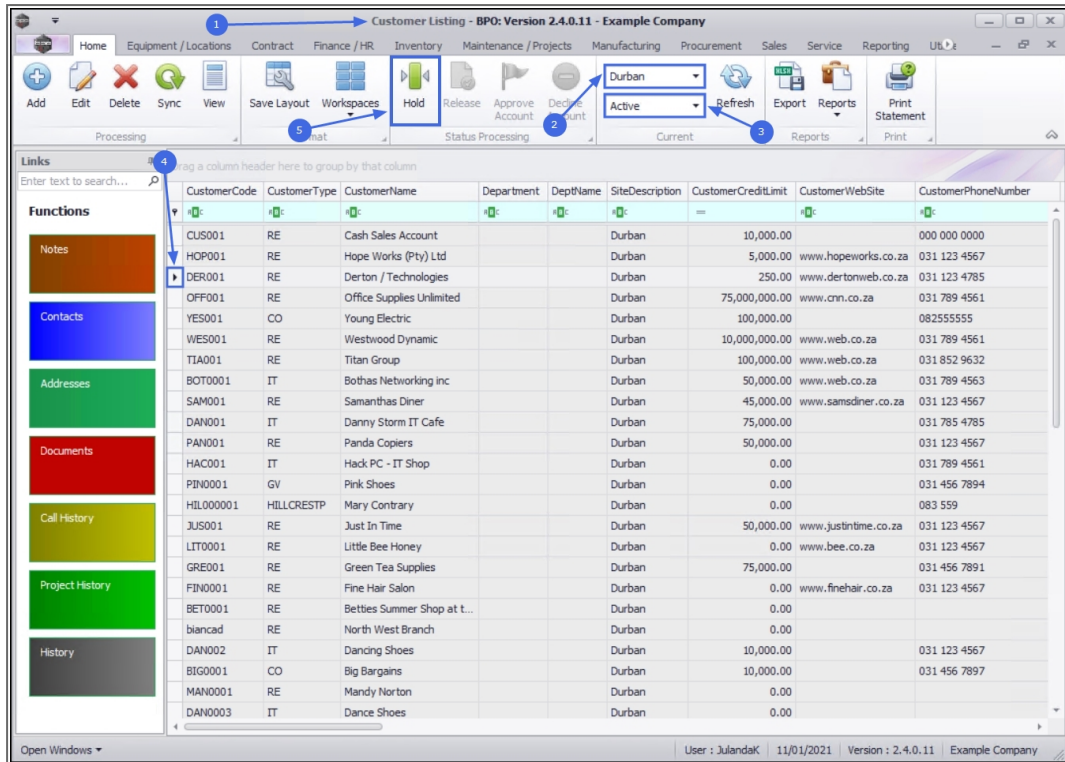


Note that only an Active customer can be placed on Hold.

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



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



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

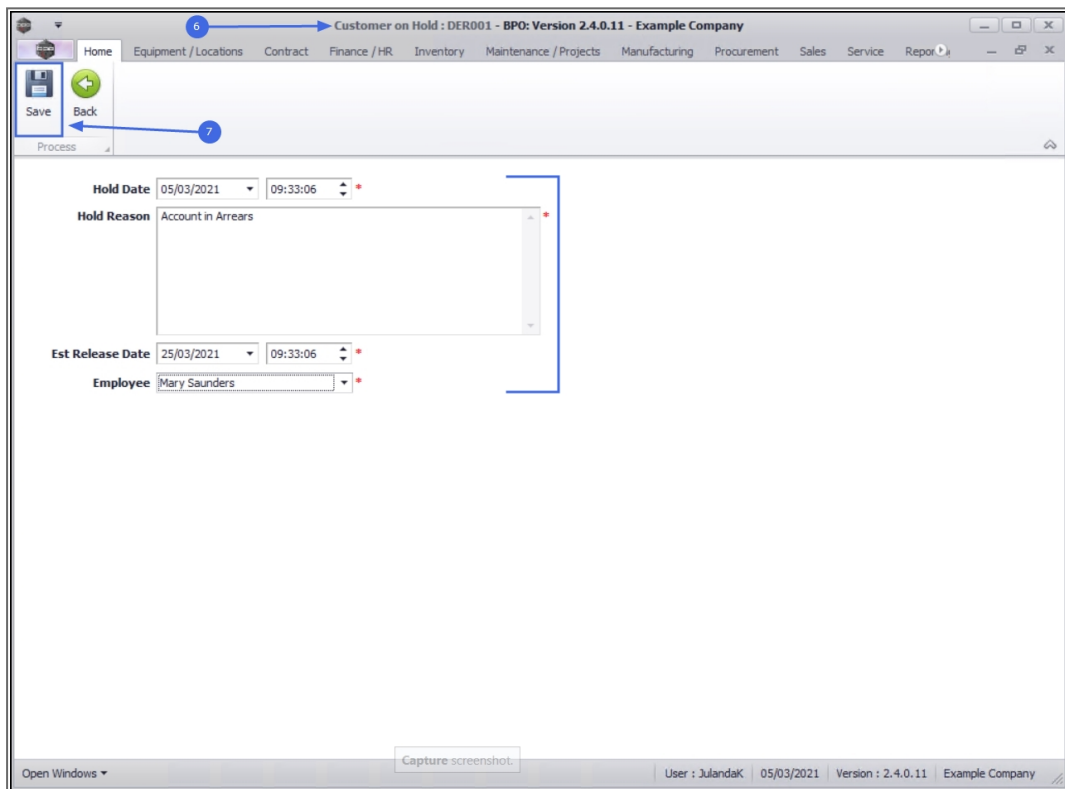
## ON HOLD DETAILS

- **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

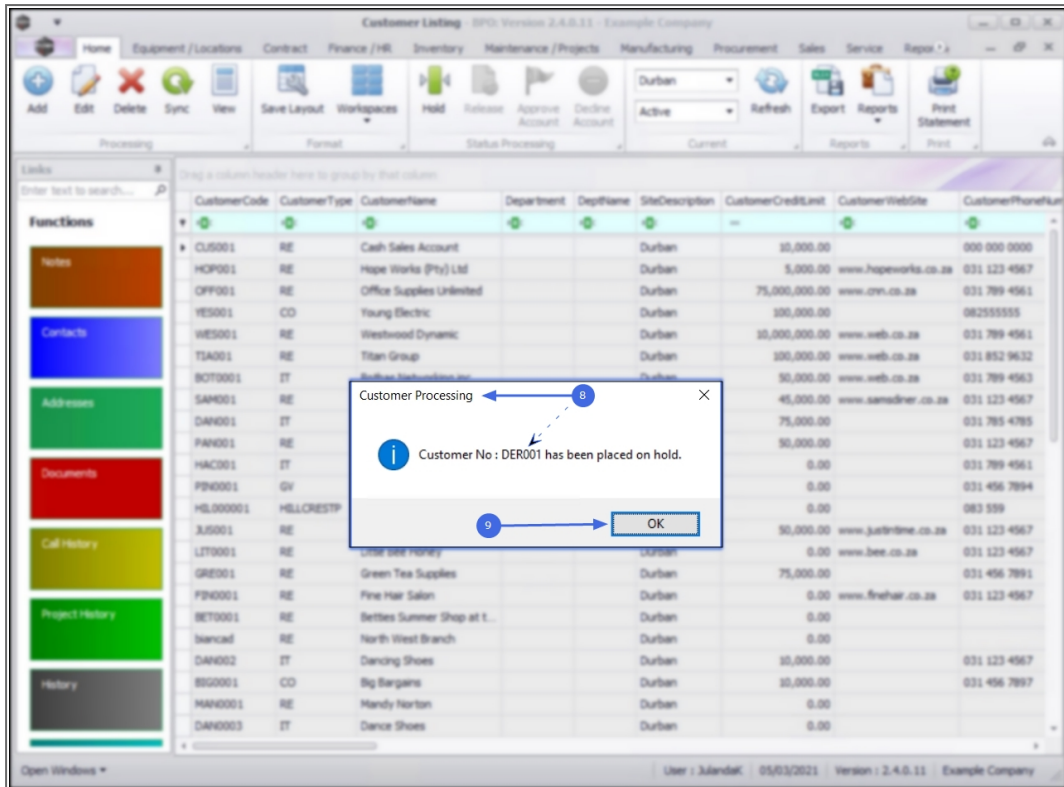
7. When you have finished adding details to this screen, click on **Save**.



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

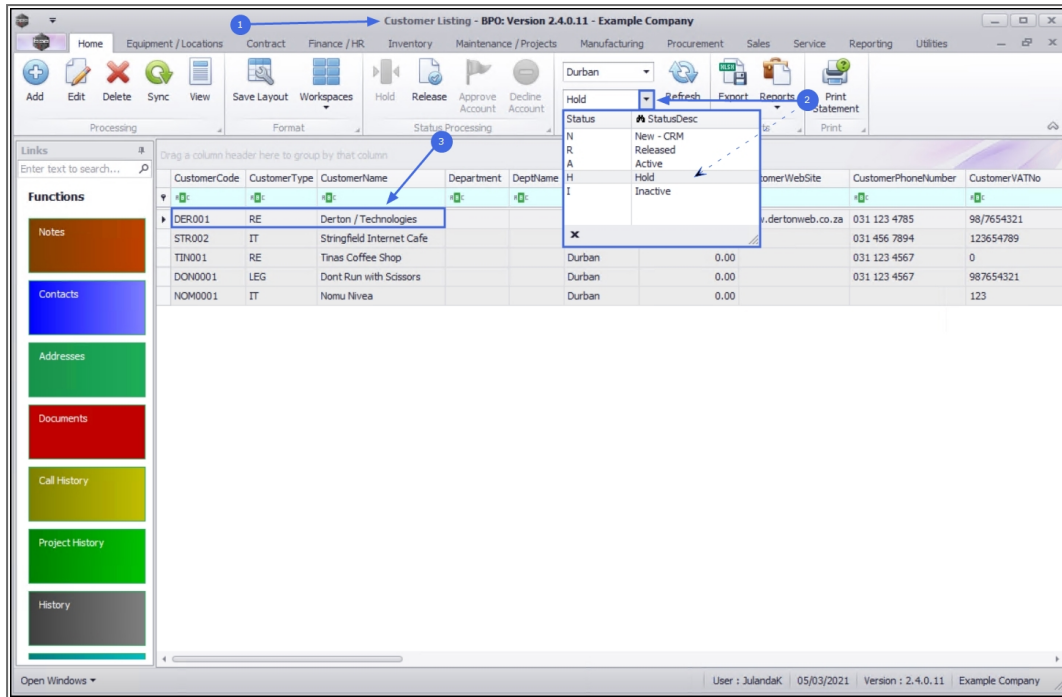
- **Customer No:** [customer code] has been placed on hold.

9. Click on **OK**.



## 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.



## Related Topics

- [Release from Hold](#)

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