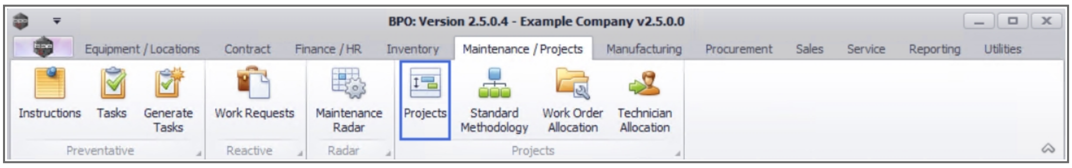
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – HOLD HISTORY

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

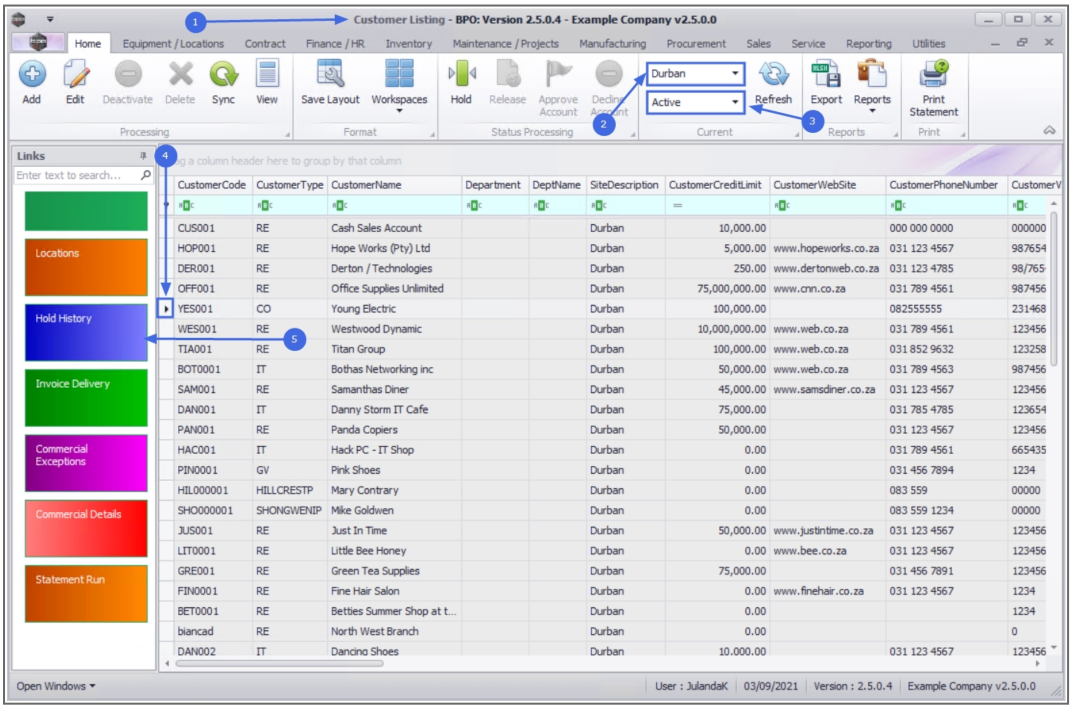
Ribbon Access: Sales > Customers



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.

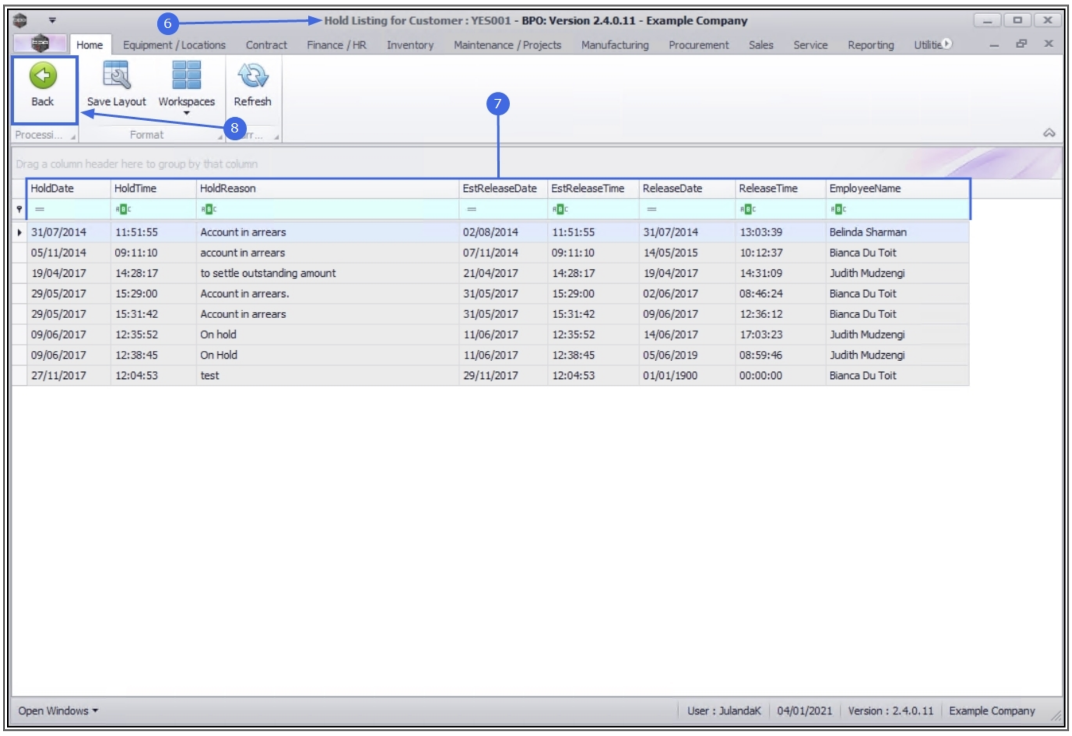
4. Click on the **row** of the **customer** whose Hold History details you wish to view.
5. Click on the **Hold History** tile.



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
6
7
8
Home
Equipment / Locations
Contract
Finance / HR
Inventory
Maintenance / Projects
Manufacturing
Procurement
Sales
Service
Reporting
Back
Save Layout
Workspaces
Refresh
Format
Drag a column header here to group by that column
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