

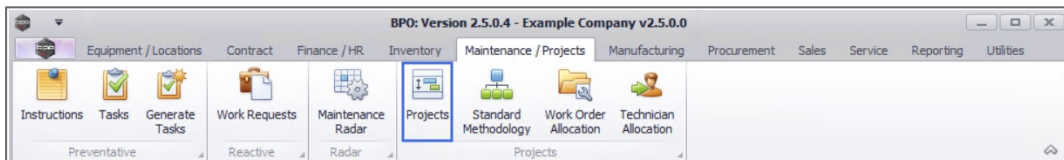
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – HOLD HISTORY

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

Ribbon Access: Sales > Customers

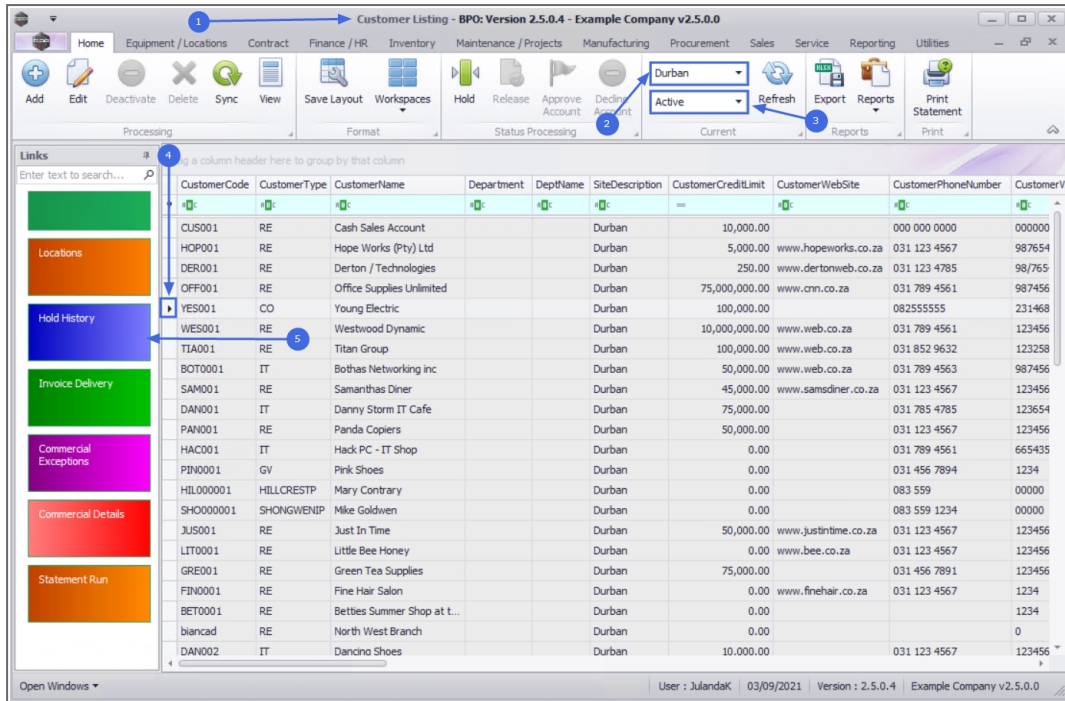


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.



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: YE5001 - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Back | Save Layout | Workspaces | Refresh

Process... | 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

