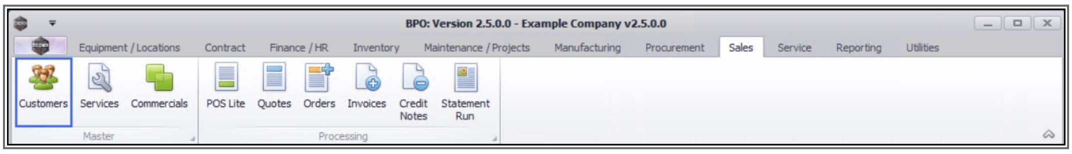
SALES

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*

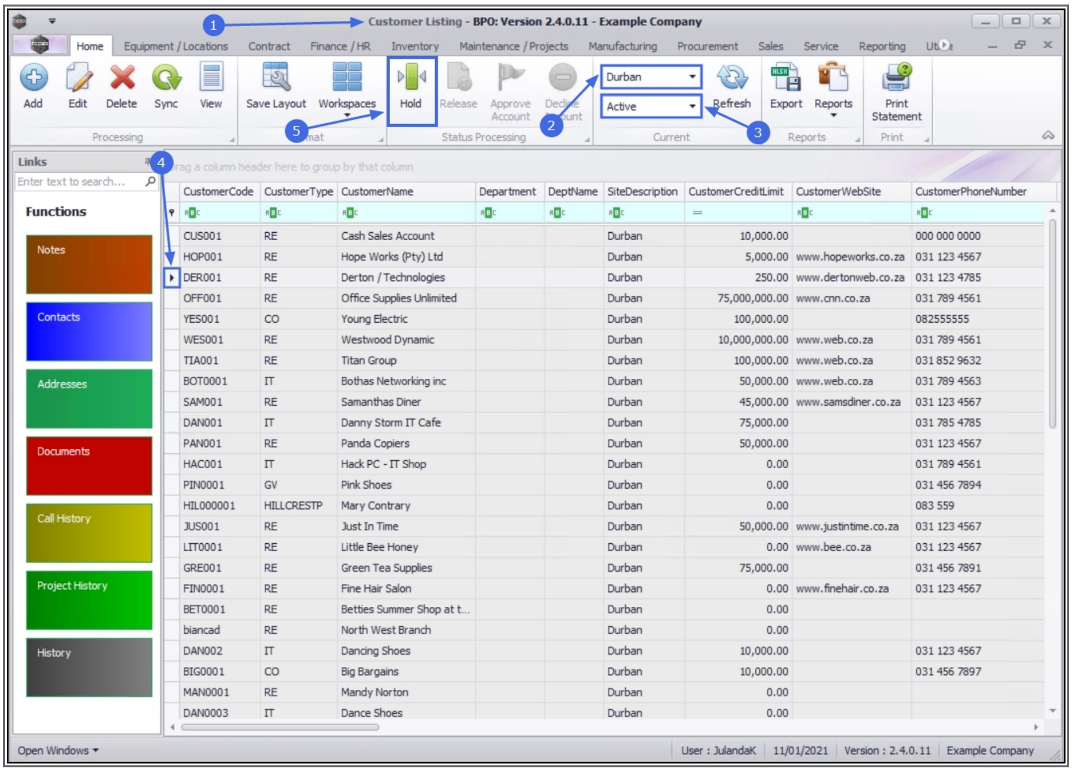


1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the customer can be located.
    - The example has ***Durban*** selected.
3. Ensure that the ***Status*** has been set to ***Active***.

> 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

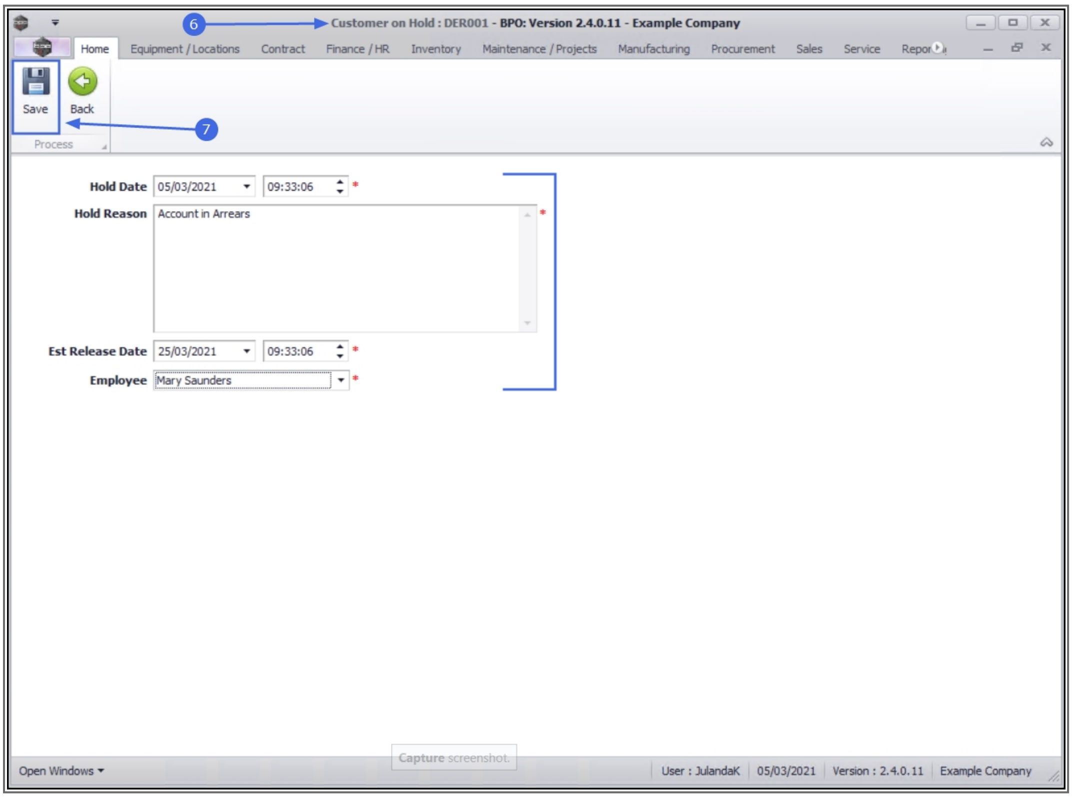
- **Hold Date** and **Time:** These fields will auto populate with the current date and time.
    - **Date:** Type in or click on the down ***arrow*** to use the calendar function to select an alternative date if required.
    - **Time:** Type in or use the ***arrow indicators*** to select an alternative 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.

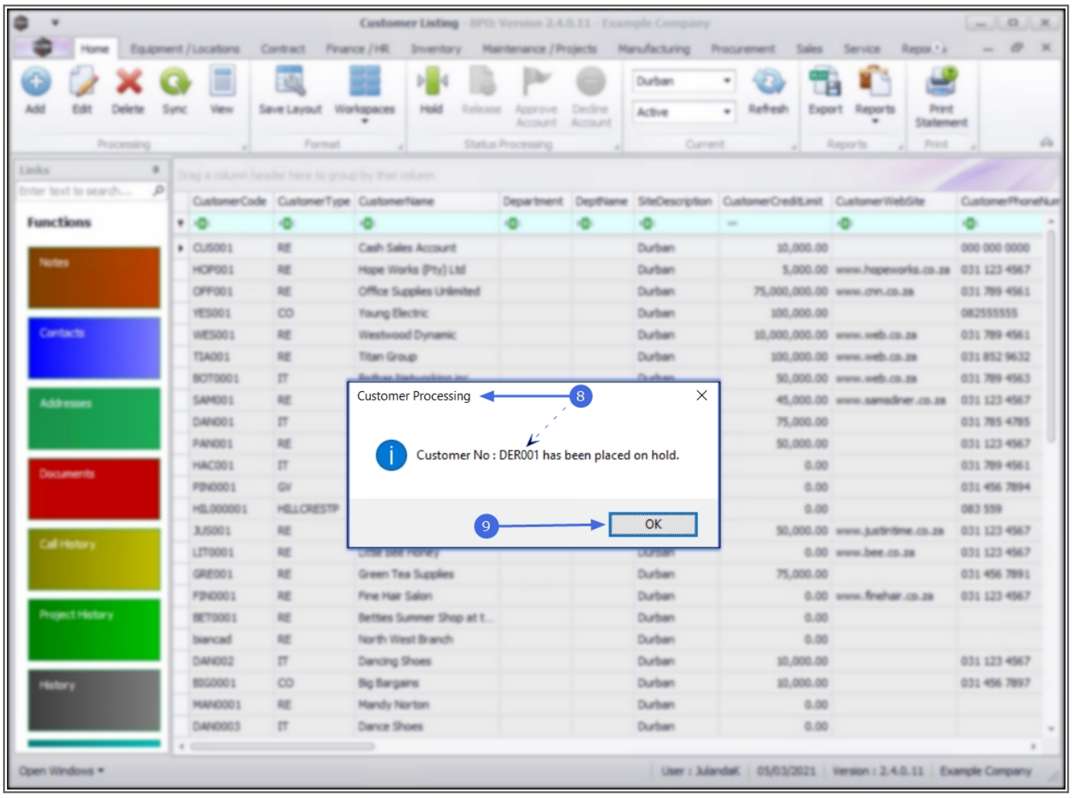
- **Employee:** This will auto populate with the person currently logged on to the system. You can click on the down ***arrow*** to select an alternative employee if required.

SAVE DETAILS

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

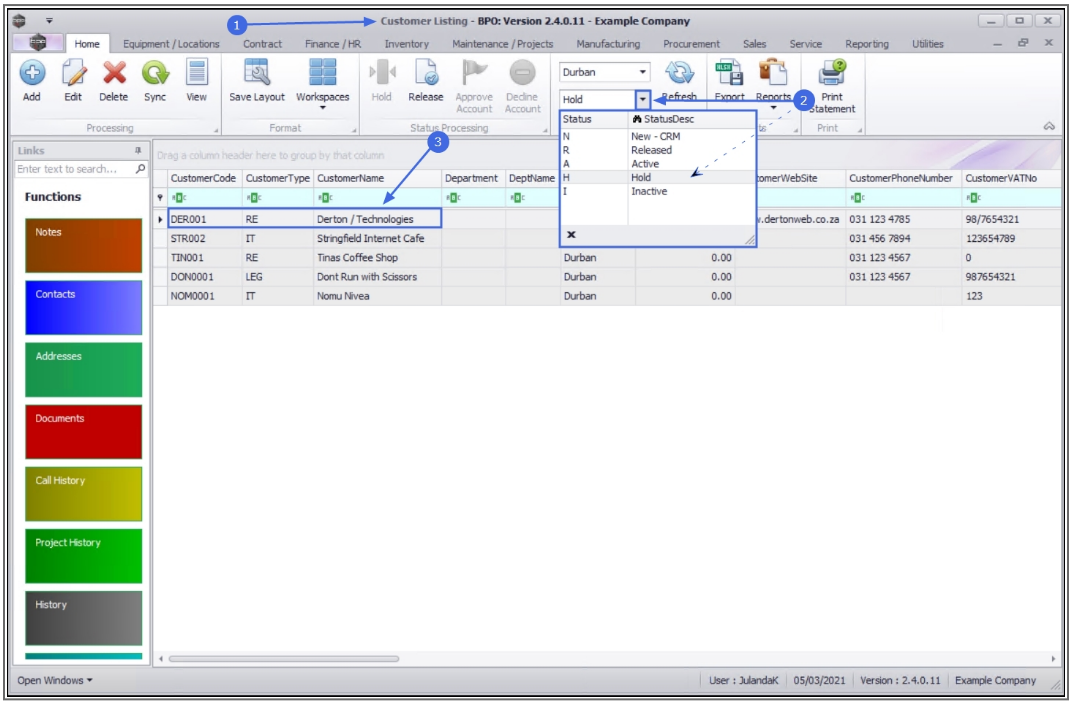


8. When you receive the ***Customer Processing*** message to confirm that;
   - ***Customer No: [****customer code****] has been placed on hold.***
9. Click on ***OK***.



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

MNU.061.012