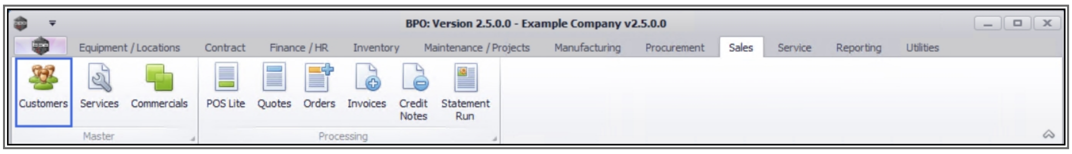
SALES

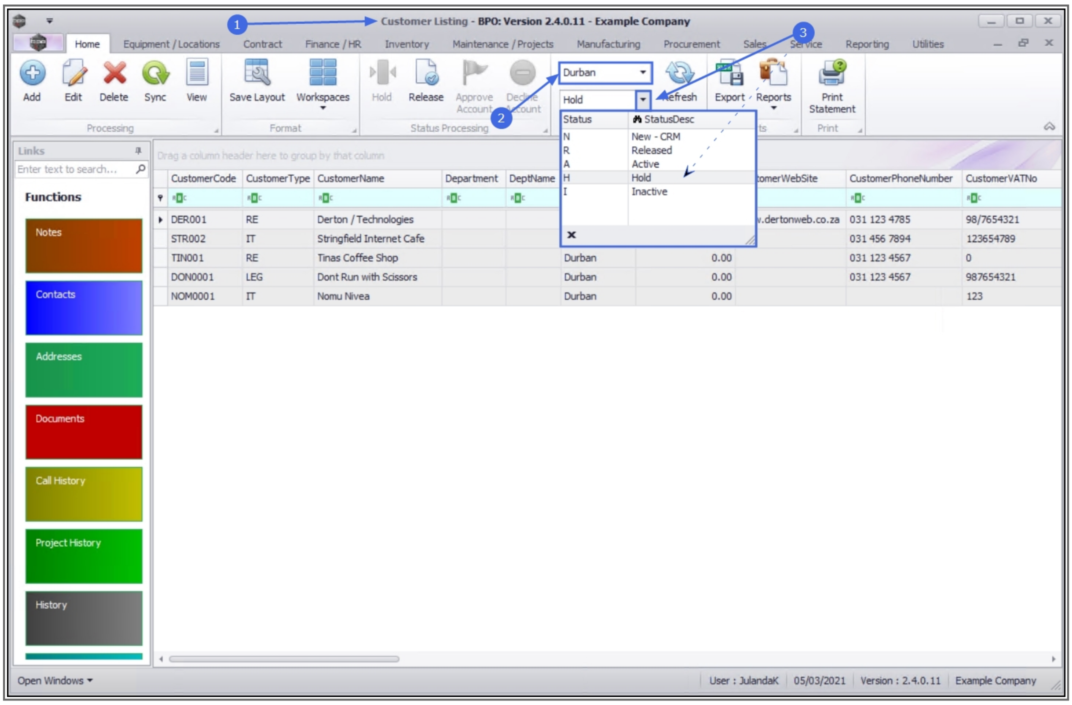
CUSTOMERS - RELEASE FROM HOLD

A Customer can be Released from Hold when the Hold requirements have been met.

Ribbon Access: *Sales > Customers*

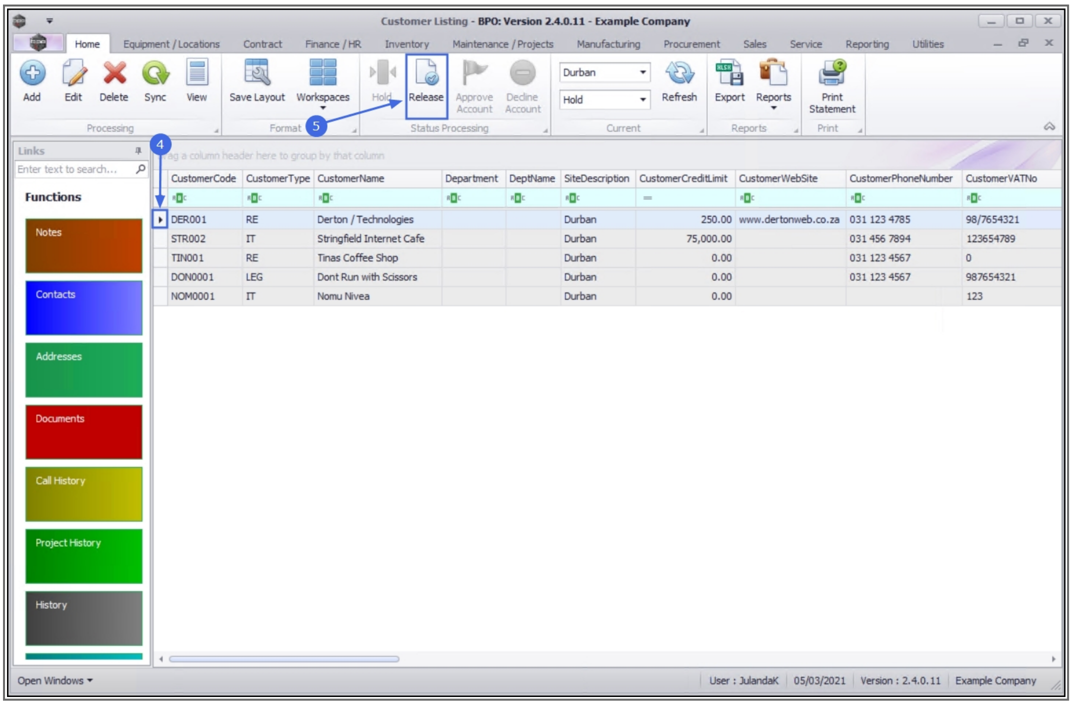


1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the Customer on hold can be located.
    - The example has ***Durban*** selected.
3. Change the ***Status*** by clicking on the down ***arrow*** to display the status drop-down ***menu***.
    - Click on the ***Hold*** status.



4. Click on the ***row*** of the ***customer*** you wish to ***release*** from Hold.
5. Click on ***Release***.

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

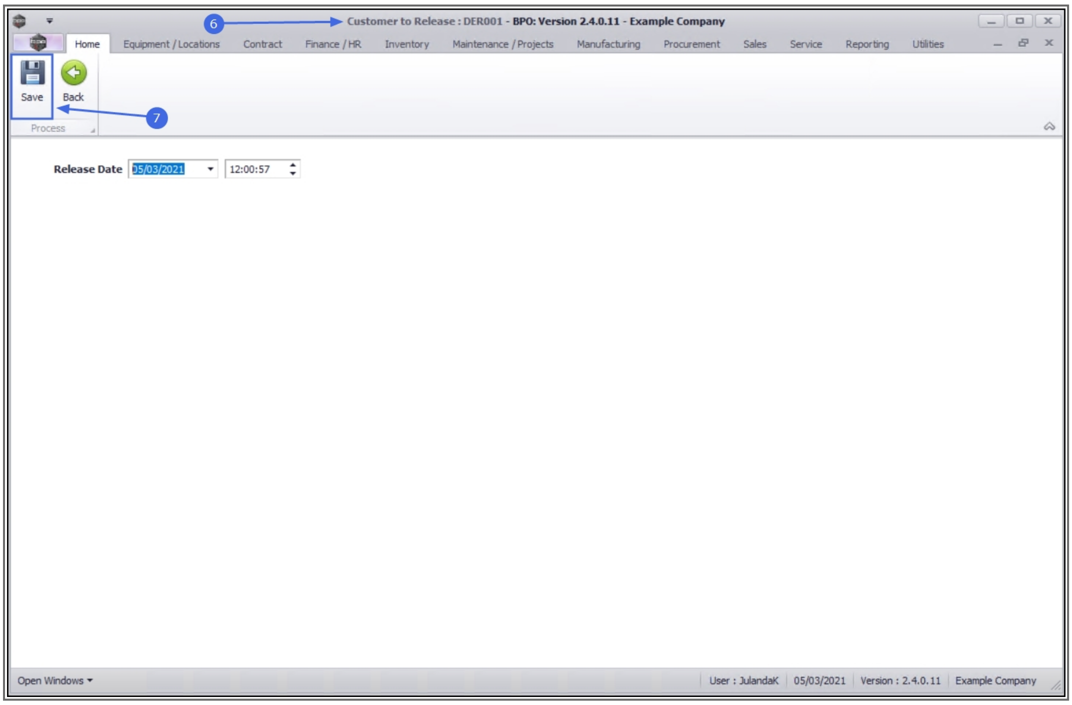


6. The ***Customer to Release: [****customer code****]*** screen will be displayed.

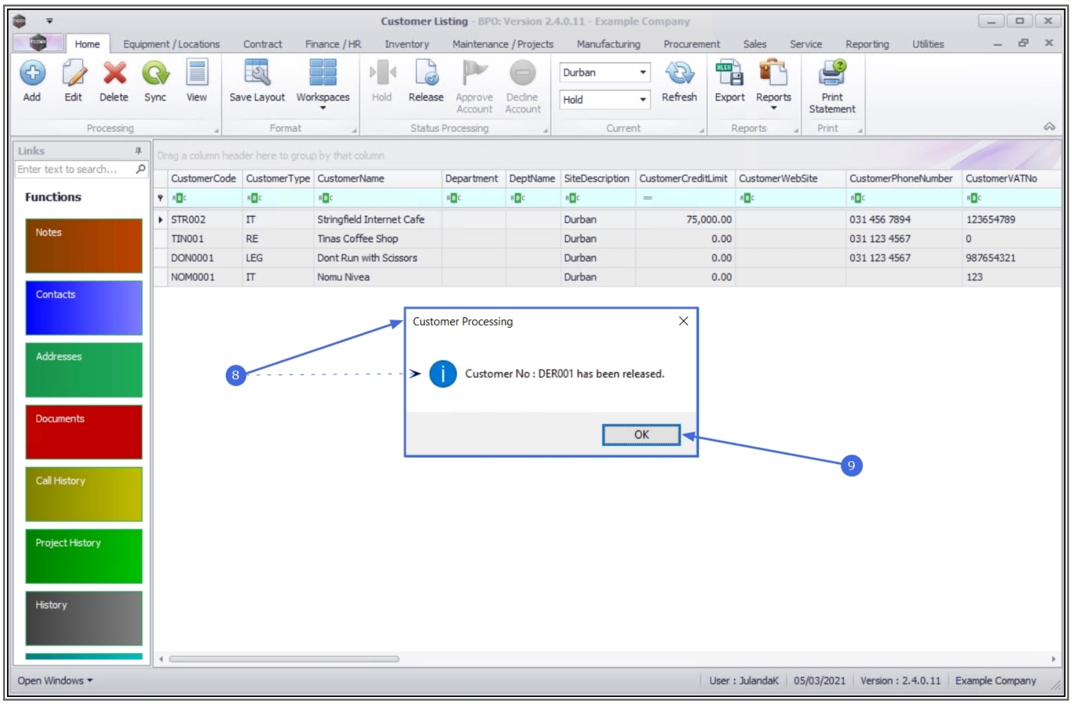
ADD RELEASE DETAILS

- The ***Release Date and Time*** will auto populate but these can be changed according to your requirements:
    - **Date:** Type in or click on the down ***arrow*** and 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.

7. Click on ***Save***.

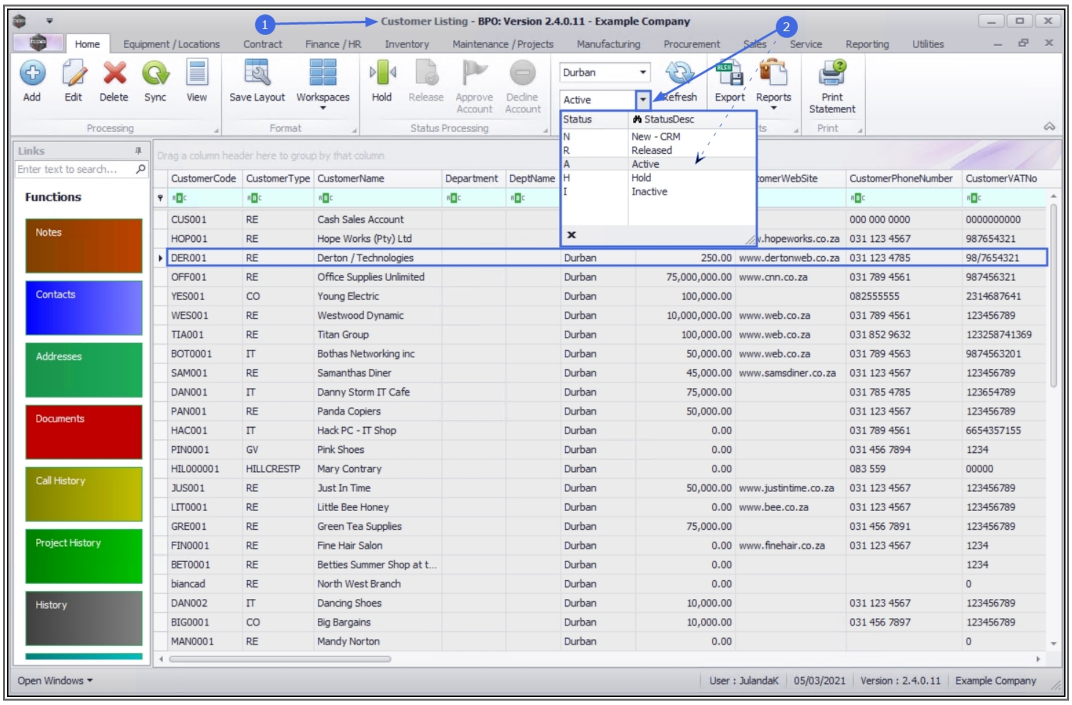


8. When you receive the ***Customer Processing*** message informing you that;
   - ***Customer No: [****customer code****] has been released.***
9. Click on ***OK***.



VIEW RELEASED/RE-ACTIVATED CUSTOMER

1. To view the customer in the ***Customer Listing*** screen,
2. Change the ***Status*** to ***Active***.



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