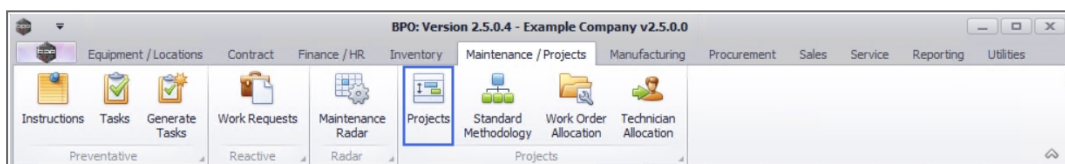


SALES

CUSTOMERS - HOLD HISTORY

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

Ribbon Access: *Sales > Customers*

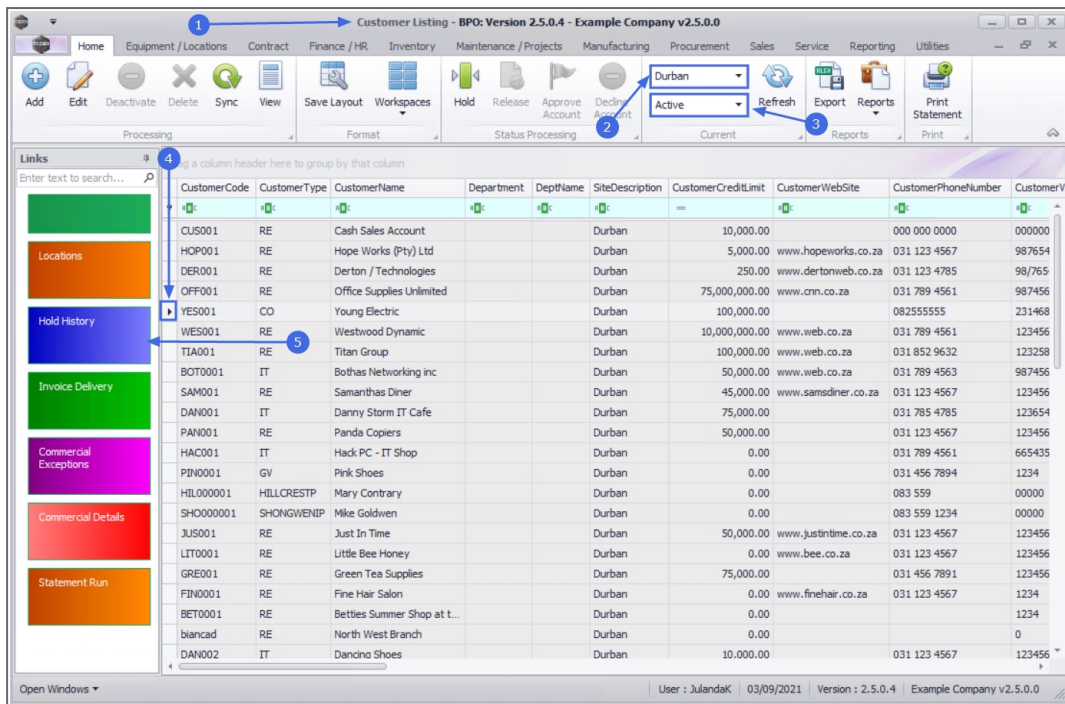


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.



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.



CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerV
CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	000000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98765
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456
YES001	CO	Young Electric			Durban	100,000.00		082555555	231468
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456
TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258
BOT0001	IT	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	987456
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	665435
PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HILL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	000000
SHO0000001	SHONGWENIP	Mike Goldwen			Durban	0.00		083 559 1234	000000
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456
FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
BET0001	RE	Betties Summer Shop at t...			Durban	0.00			1234
biancad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancino Shoes			Durban	10,000.00		031 123 4567	123456

- 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.

- The Hold History is automatically generated when the Customer is **Placed on Hold** or **Released from Hold**.
- Click on **Back** to return to the **Customer Maintenance** screen

Hold Listing for Customer : YES001 - 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 Sharmar
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

