

CONTRACT

HOLD HISTORY

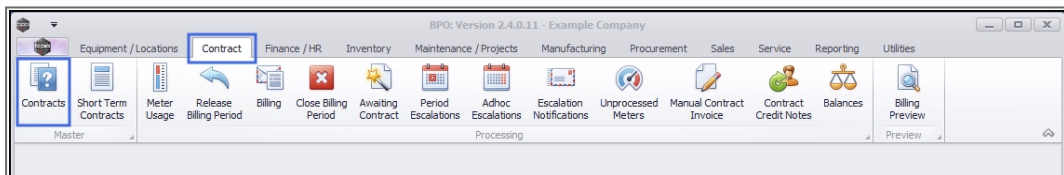
A customer may be put on **Hold** for a variety of reasons, for example:

- a credit check failure
- exceeding payment terms

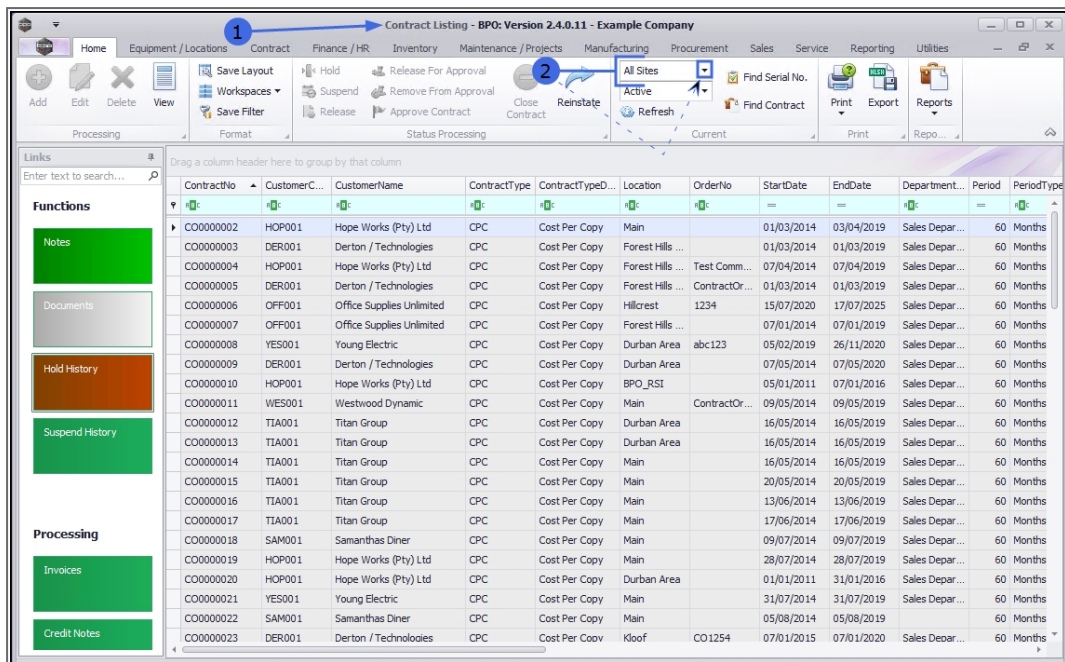
The Hold History of a selected Contract may be viewed from the **Contract Listing** screen.

Refer to [Place a Contract on Hold](#) and [Release a Contract on Hold](#) for more information about placing a Contract on Hold.

Ribbon Access: *Contract > Contracts*



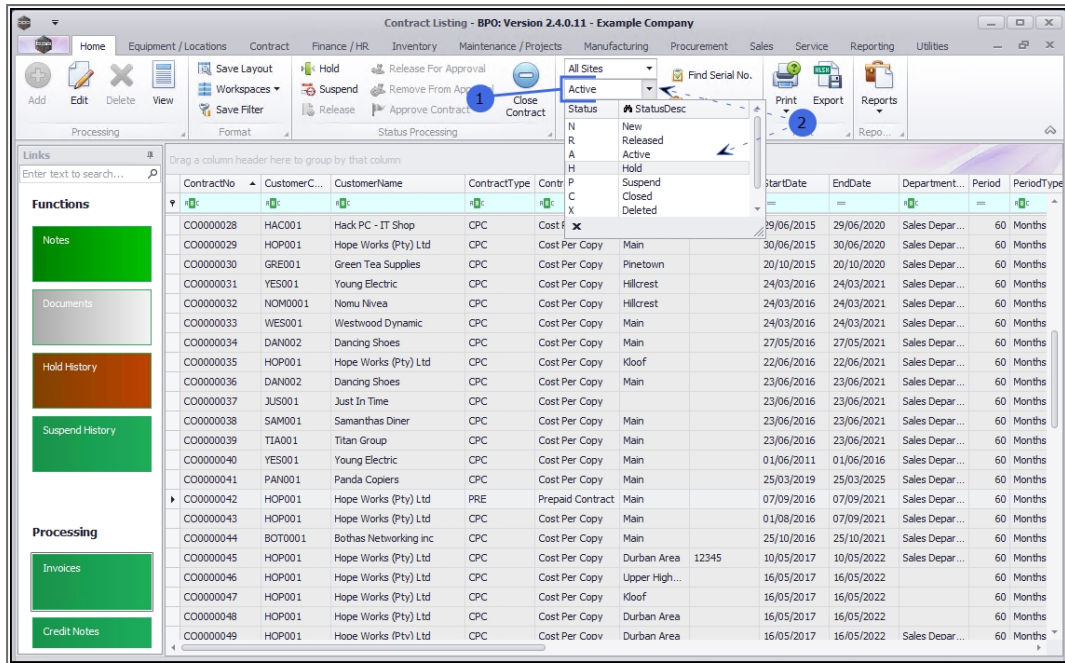
1. The **Contract Listing** screen will be displayed.
2. Select the **Site** that you wish to work in.



1. This screen opens by default in the **Active** status.
2. Select a different **status** from the drop-down menu, if required.

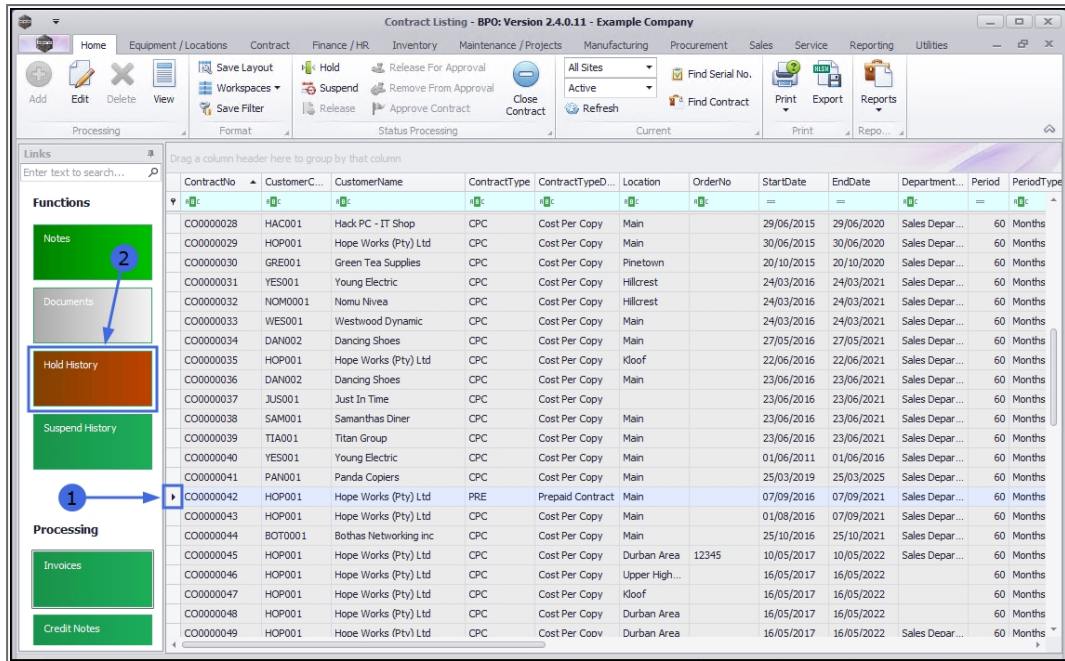
■ **Notes:**

- If the contract you wish to view, is **currently** on Hold, select the **Hold** Status from this menu.



VIEW HOLD HISTORY

1. Select the **row** of the **contract** where you wish to **view** the Hold History.
2. Click on the **Hold History** tile.



1. The **Hold History for Contract No.: []** screen will open.
2. Here you can view a historical list of **reasons** why the selected contract has been put on Hold.
3. The **Date** the Hold period started and the **Employee** who initiated this Hold period is recorded.
4. The **Estimated Release Date** and **actual Release Date** are also captured.
5. Click on **Back** to return to the **Contract Listing** screen.

Hold History for Contract No.: C00000042 - 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

Process... Format

Drag a column header here to group by that column

HoldDate	HoldTime	EmployeeName	HoldReason	EstReleaseDate	ReleaseDate	ReleaseTime
17/07/2019	00:00:00	Bianca Du Toit	This customer was put on hold by the on service limiter. The service limit is 6.5 hours, the hours used is 6.5 over the last 90 days.	19/07/2019	25/02/2021	13:53:50
25/01/2021	00:00:00	Abigail Milne	Updated contract needs to be approved.	27/01/2021	01/02/2021	13:57:03
23/03/2021	13:46:57	Abigail Milne	Monthly payment overdue.	25/03/2021	01/01/1900	00:00:00

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