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How Do You Place an Order on a Credit Hold?

Tammy Mason - 2017-09-15 - in Quotes, Orders & Invoices

How Do You Place an Order on a Credit Hold?

User Manage- Now has a check box to indicate if the user is a credit manager.

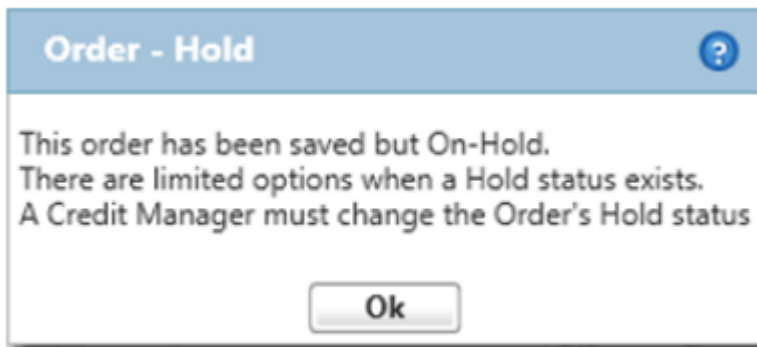
The screenshot shows the 'User Manage' interface. At the top, there are fields for 'User Name' (Admin), 'Role' (Administrator), 'Email Address' (donnab@asicomp.com), and a checked 'Active' checkbox. Below these are 'Backup Reminder' and 'Reset ASI SmartBooks Password' buttons. There are two login sections: 'ESPOnline Login' and 'ASI SmartSales Login', each with 'Email Address' and 'Password' fields and a 'Test Login' button. A red box highlights the 'Credit Manager' checkbox, which is checked. Below this is a 'Salesperson Access' table with columns for 'Name' and 'Code'. The table contains three rows: '(Records with no salesperson)' with code '(None)', and 'House Account' with code 'House'.

Name	Code
(Records with no salesperson)	(None)
House Account	House

- When a customer is placed on a hold status, orders and quotes that are entered for that customer will also be placed on hold. The user that is entering the order will be notified that the order is being placed on hold, when it is saved.

The screenshot shows the customer record header. It includes fields for 'Code' (DCS), 'Name' (Denver Community Schools), and 'Status' (Active). There are buttons for '+ New Order' and '+ New Receipt'. The 'SMARTSALES' logo is visible. A red box highlights the 'Hold' checkbox, which is checked.

- The hold status can only be added or removed by a credit manager.



- If a quote is on hold and you try to create an order, you will receive a message that this is not allowed.

C	Bill To Name	Status	Products	Service	Contacts	Order	In Hand	Ship Date	PO	Customer	Costing	Hold
122	Denver Community School:	Open	(1)		(3)	02/27/2015	01/19/2015	01/19/2015		DCS		<input checked="" type="checkbox"/>
121	Denver Community School:	Open	(1)		(3)	02/19/2015				DCS		<input type="checkbox"/>

- If the customer on an existing order is changed to a customer that is on hold, the order will then be placed on hold at the time it is saved.