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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.
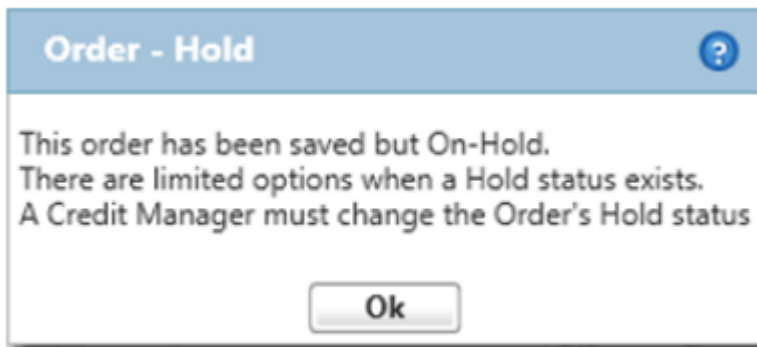

- When a customer is placed on a hold status, orders and quotes that are entered for that customer will also be placed on hold. The user that is entering the order will be notified that the order is being placed on hold, when it is saved.

- The 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 Schools	Open	🛒(1)	🗍	👤(3)	02/27/2015	01/19/2015	01/19/2015		DCS	C	✔
121	Denver Community Schools	Open	🛒(1)	🗍	👤(3)	02/19/2015				DCS	C	☐

- 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.