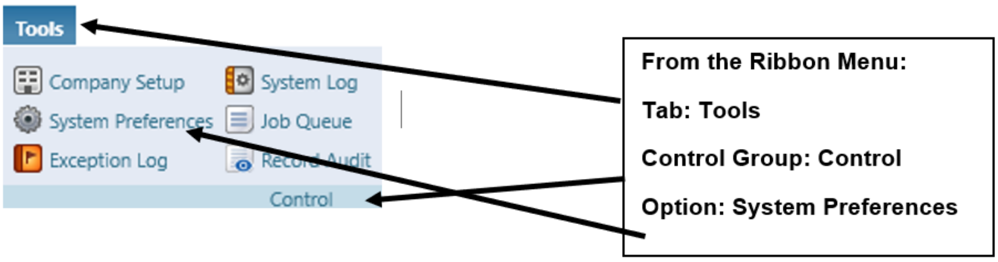
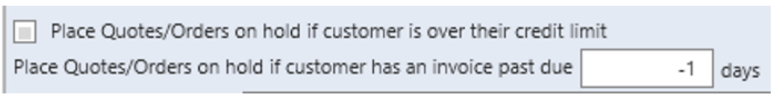
ASICOMP.COM

Place a Credit Hold on a Customer?

Tammy Mason - 2022-07-18 - in Customers

Place a Credit Hold on a Customer?

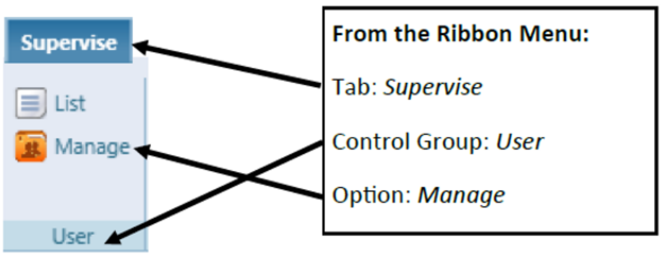




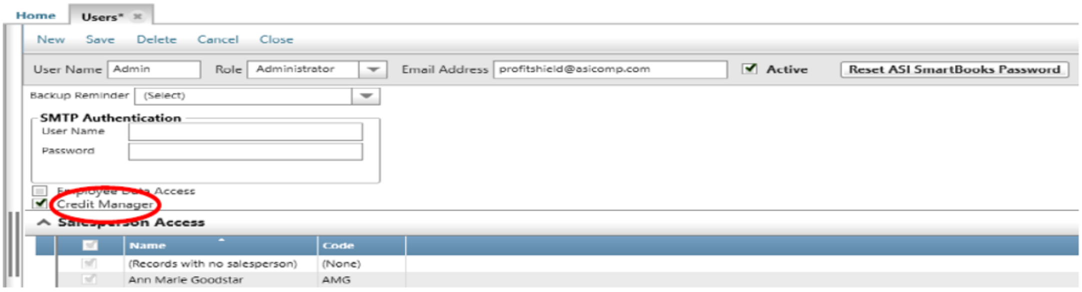
There are two options for allowing the system to place quotes and orders on hold, based on a customer's credit limit and/or the age of past due invoices. This allows you to better manage Customer Receivables.

These options are in addition to the ability to manually place a customer on hold (which will then place any new quotes/orders on hold.

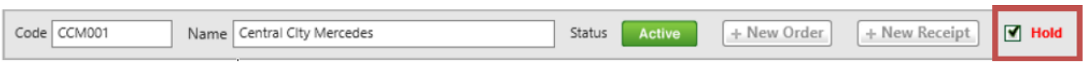
A user can be setup as a credit manager. A credit manager may put a customer, orders and quotes on/off hold.



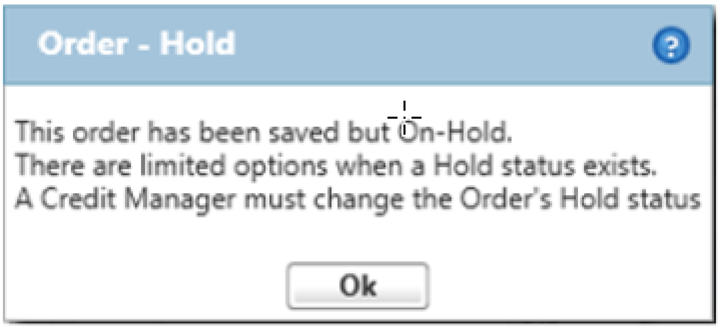
User Manage- Has a check box to indicate if the user is a credit manager.



When a customer is placed on a hold status, orders and quotes that are then 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.

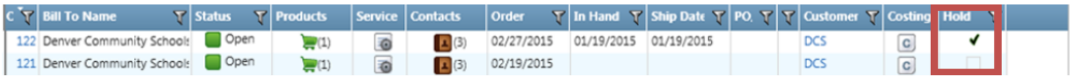
If the customer on an existing order is changed to a customer that is on hold, the order will then be placed on hold at the time it is saved.

If a customer (who is not on hold) is over their credit limit or has past dues invoices, it will alert the user and place the order or quote on hold.

Once an order or quote is on hold, the user can continue to work within the quote or order and save any additions or changes.

Orders and quotes cannot be viewed or printed-but can be turned into an invoice when they are already completed.

Receivables List – An Optional Column for Customer Hold has been added to the report.



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	