

On Hold

On hold refers to the status of a debtor or customer account.

On hold allows you to temporarily restrict certain actions against a debtor or customer, such as processing debtor or customer documents due to the following reasons

- Credit limit exceeded
- Payment issues
- Document requirements and other reasons related to internal policies

How to put a customer on hold:

Debtors/ Customer Module> Configuration> Debtor/Customer setup> Account Details Tab

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Functions Standard Alerts Close

Code : **OTS001** Debtor Name : **Otsile** Outstanding Balance: **21 994.2200**

Details Address Contacts **Account Details** Gen Details Statutory Info Custom Fields Activity Ti

Default Currency: Rand South Africa Over Due: **22 194.2200** Interest Setup

Price Level: Default Last Payment & Date: **2022-06-08** 100.0000

Line Discount: Last Invoiced & Date: **2023-11-16** 40.2500

Line Markup cost plus: Ageing: ☒ Date Of Statement ☐ Date Of Invoice

Discount Matrix: Account Terms: 20 Day Of Month 1

Document Discount: 0 Forex Tax Type Override:

Exclude From Bank Exports: ☐ Payment Terms:

On Hold: ☒
On Hold Reason: Over 100000 is outstanding

Enforce Credit Limit: ☐
Credit Limit: 0.0000
T/C Invoice:
T/C Credit Note:

Legal Hand Over: ☐ Hand Over Details

Enable Statement Note: ☐
Statement Note:
Statement Type: Standard
Statement Stationery:

Quote Template:
Sales Order Template:
Invoice Template: Stationery/Invoice_CA7000683.xml
Credit Note Template: Stationery/CreditNote_CL3000153.xml
Delivery Note Template:
Delivery Note 2 Template:

Save and New Save and Close Save Close

Once done with putting a debtor or customer on hold then click save and close and you will see the icon below on debtor or customer status, the icon means that the customer is on hold



The documents that are affected by Onhold are:

- Quotations
- Sales Order
- Sales Order Confirm
- Invoices
- Credit Notes
- Stock Dispatch

Documents On hold

When a debtor or customer is on hold you can still create all transaction documents, affected by on hold but you will not be able to process them.

You can promote a quotation to invoice or sales order but will not be able to process it.

If a debtor or customer is on hold it will show on the grid and when you are creating any transaction document

See examples below:

Invoices

Search

Add

Edit

Clone

Cancel

Process Invoice

Quick Process

Proforma Inv. Process

Functions

Print / Export

Basic Search

Custom Search

Expand

Customer:OTS001 - Otsile

L:

Invoice Status:Preparation And Part Invoice

Description:

Reference:

Date From:2024-01-13

Date To:2024-02-12

Order Number:

Sales Rep.:

Total Ex VAT:264.0000

Total VAT:39.6000

Total Inc VAT:303.6000

Page 1 of 1

Remove Paging:

Import Invoice Document or Template

Invoice Date	Debtor Code	Debtor Name	On Hold	#	Att	Memo	Invoice Status	Description	Reference	Order No.	Sales Rep.
2024-02-09	OTS001	Otsile	Yes	1			Proforma Posted	Test Onhold	Test Onhold		CO

When creating a new invoice or any document for a debtor or customer you will see the prompt below:

Attachments Memo Create Reminder Check Stock Qty's Functions Import Order History

Invoice

Detail Address Extras **Link** Shipping Action Scan

Invoice Number: **On Hold** Invoice Status:

Customer: OTS001 Description:

Customer Name: Otsile Reference:

Sales Rep.: Company Order Number:

Invoice Date: 2024-02-12 Currency View: Document Currency

Due Date: 2024-03-20 20 Day Of Month 1 Exchange Rate: 1.000000000 R - Rand South Africa

Debtor Status: Commission Complete Comment:

Save Close View Quote Print Invoice Process T & Cs Payments

Items

Debtor on hold. Please note **Otsile** is currently **On Hold**. Reason: Over 100000 is outstanding

OK

Footer

Promotion Value: Clear Discount

Discount %: 0.00 Amt: 0.00

Service Month: February

Internal Contact: Otsile Loate

Pricing Analysis		Total	Selling
Margin %		Sub Total	
Mark-up %		Discount	
Cost Ex VAT		Ex VAT	
Profit		VAT	
Payments		Inc VAT	

When you have finished capturing a document and click "Process," a prompt message will appear.

Attachments				Memo		Create Reminder		Check Stock Qty's		Functions ▾		Import ▾		Order History	
Invoice															
Detail		Address		Extras		Link		Shipping		Action		Scan		Save	
Invoice Number:				On Hold				Invoice Status:				Preparation			
Customer:				OTS001				Description:							
Customer Name:				Otsile				Reference:							
Sales Rep.:				Company				Order Number:							
Invoice Date:				2024-02-12				Currency View:				Document Currency ▾			
Due Date:				2024-03-20 20 Day Of Month 1				Exchange Rate:				1 R - Rand South Africa			
Debtor Status:				Commission Complete				Comment:							
Close View Quote Print Invoice Process T & Cs Payments															
Items															
Error Occurred Invoice Processing Error Message : OTS001 - Otsile is currently onhold\nReason: Over 100000 is outstanding OK															
Displaying 1 - 1 of 1															
Unit Sale Sales Re															
150.0000 CO															
Footer															
Promotion Value: 0.0000000 Clear Discount								Pricing Analysis				Total			
Discount %: 0 Amt: 0.00								Margin % (33.3333)				Sub Total 300.0000000			
Service Month: February ▾								Mark-up % (25.0000)				Discount 0.0000000			
Internal Contact: Otsile Loate ▾								Cost Ex VAT 400.0000				Ex VAT 300.0000000			
								Profit (100.0000)				VAT 45.0000000			
								Payments 0.0000000				Inc VAT 345.0000000			

Revision #6

Updated 4 October 2024 21:57:05 by Otsile