

Putting a Customer On Hold

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You don't want to turn away business but at the same time you do not want to allow your customers to exceed their credit limits. When that happens, you can put a customer On Hold as follows:

1. Edit the customer
2. Navigate to the Payment tab
3. Check Hold Orders
4. Click Yes to confirm.
5. Click Save to save into the customer.

When a customer is on hold, you can still create a sales order but you will not be able to approve the order for shipment.

The screenshot shows a customer profile for '68 Proteus Caret'. The 'Payment' tab is active, and the 'Hold Orders' checkbox is checked. A confirmation dialog box is open, asking 'Changing this setting will update the statuses of open sales orders for this customer. Would you like to continue?'. The 'Yes' button is highlighted. The 'Save' button in the top right corner is also highlighted.



It is a good practice to add an Exception for Hold Orders in roles so that only certain users can edit this value.