

Updating Credit Hold Invoice

Overview

In instances where an online wholesale customer submits an order but is over their credit limit, a credit hold invoice is created. This is a suspended transaction with all of the items they have ordered, which can be released once they are back below their credit limit.

Receiving The Order

When the original order is submitted, a credit hold transaction will print. This will look much like a regular invoice, but will be marked as a 'Credit Hold Invoice' on the paper. It will also have a number in the 9,000,000 range.

Before releasing the credit hold invoice, you must bring the customer back down below their credit limit. To do this, you may increase their limit or receive a payment against the account.

Releasing the Invoice

To release a credit hold invoice, you will need to take the following menu path:

4. Sales Desk > 5. Transaction Queries > 7. Credit Hold Invoice Release

Customer		All customers			Credit Hold Invoice Release	
Line #	Hold #	Customer	Cr Limit	Available Cr	Date	Value
01	9001514	OK TIRE & AUTO SERVICE	8550.00	7627.16	2019/12/21	16.78
02	9001515	OK TIRE & AUTO SERVICE	8550.00	7627.16	2019/12/21	18.99
03	9001516	OK TIRE & AUTO SERVICE	8550.00	7627.16	2019/12/21	317.99
04	9001518	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/01/11	197.99
05	9001527	OK TIRE & AUTO SERVICE	1550.00	289.44	2020/02/14	274.49
06	9001536	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/03/14	621.98
07	9001537	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/03/14	333.98
08	9001543	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/04/04	359.98
09	9001544	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/04/04	359.98
10	9001556	OK TIRE & AUTO SERVICE	8550.00	7627.16	2020/06/30	39.99
11	9001566	OK TIRE & AUTO SERVICE	1550.00	289.44	2020/09/18	274.49
12	9001567	OK TIRE & AUTO SERVICE	1550.00	289.44	2020/10/07	37.49
13	9001575	OK TIRE & AUTO SERVICE	0.00	0.00	2020/11/09	0.89
14	9001576	OK TIRE & AUTO SERVICE	0.00	0.00	2020/11/09	1.29
15	9001577	OK TIRE & AUTO SERVICE	1550.00	289.44	2020/11/09	277.99
16	9001579	OK TIRE & AUTO SERVICE	0.00	0.00	2020/11/13	0.59
17	9001580	OK TIRE & AUTO SERVICE	0.00	0.00	2020/11/13	0.59
18	9001596	OK TIRE & AUTO SERVICE	2500.00	334.23	2021/02/26	632.07
19	9001620	OK TIRE & AUTO SERVICE	1550.00	289.44	2021/07/15	27.92

E)xit, Q)uit, N)ext, Line # **N**.

Once you have a listing of the invoices, selecting any line number will give you the option to take action against that respective invoice.

D)etail, R)elease, C)lear? **D**

Your options are:

- D)etail - Show the invoice detail on screen
- R)elease - Try invoicing the transaction. Note that if the customer is still above their credit limit a new Credit Hold Invoice will be created
- C)lear - Remove the transaction from the listing. This will delete the transaction from the system completely.

Revision #1

Created 15 September 2021 23:06:58 by Jim

Updated 4 October 2021 16:37:47 by Jim