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

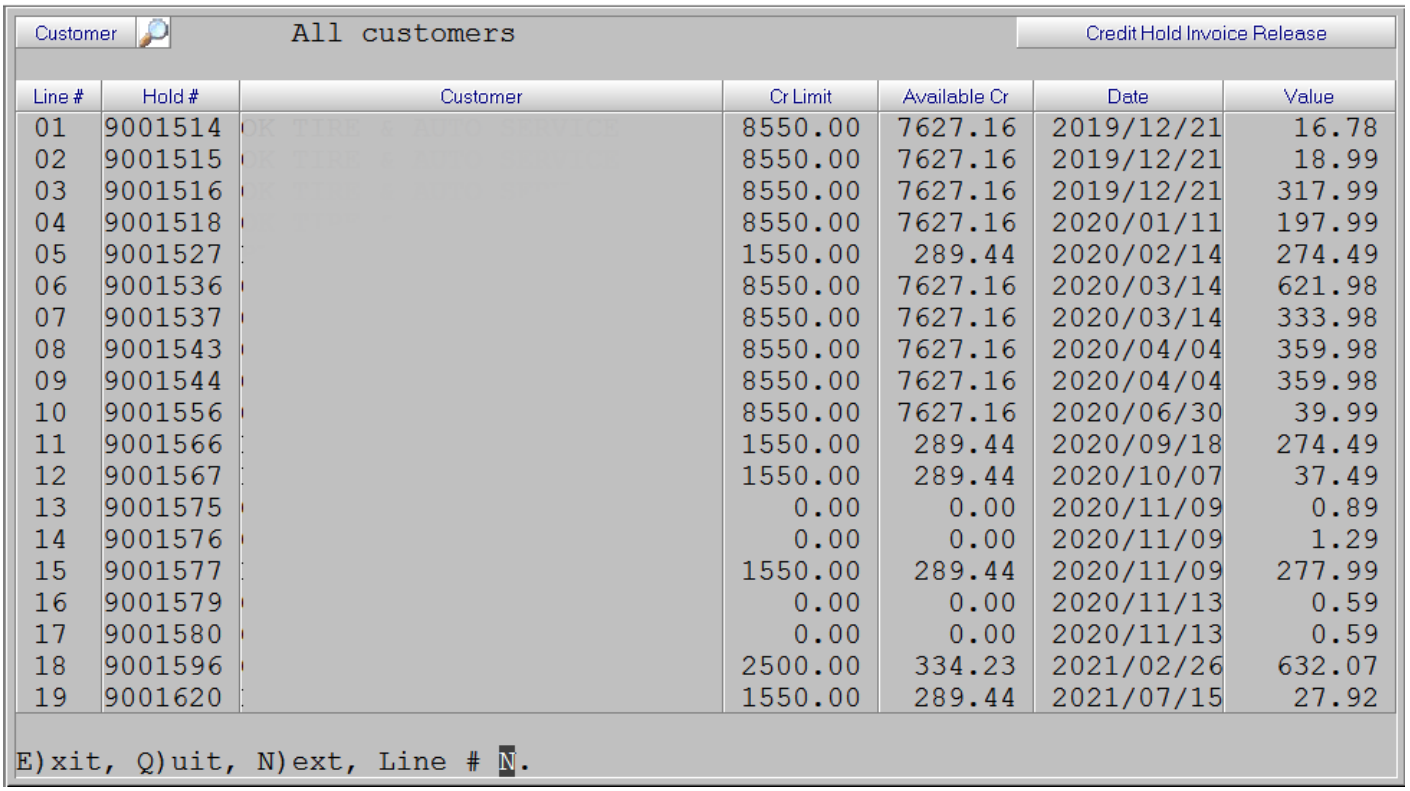
When the original order is submitted, a credit hold transaction will print. This will look much like a regular invoice, but will be marked as a 'Credit Hold Invoice' on the paper. It will also have a number in the 9,000,000 range.

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



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

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



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.

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