

# Standard Operating Procedure On Hold Report by Sales Rep

Dole & Bailey, Inc.

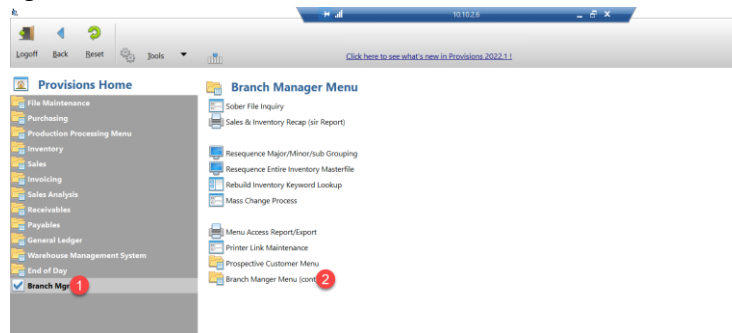
Implementation Date 03/28/23

**PURPOSE:** Produce weekly On Hold Customer Report by Sales Rep for proactive dissemination to Reps to address with customers prior to order placement.

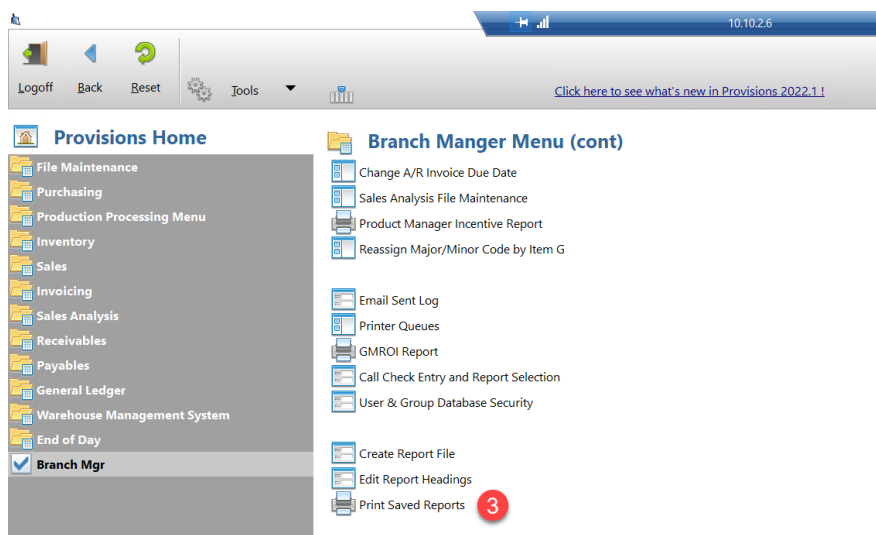
**RESPONSIBILITIES:** Accounts Receivable Department

From Provisions Home Menu

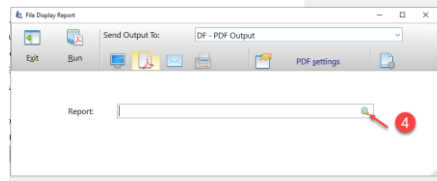
1. Click "Branch Manager"
2. Click on "Branch Manager Cont"



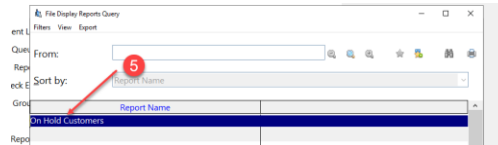
3. Select "Print Saved Reports"



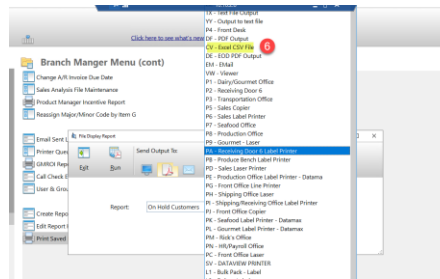
4. Click on the magnify glass in the Report block



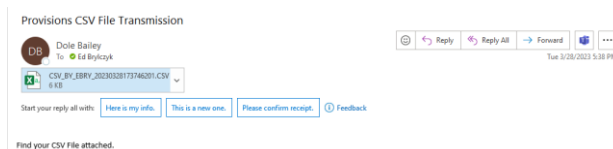
5. Double click on the On Hold Customers Report



6. in the Send Output dropdown select CV-Excel CSV File and then hit the RUN button



7. At this point the menu will close and you will receive an email with the Report in Excel Format



8. You may now sort this file by Sales Rep and Snip each section for each rep and send in Teams to Rep, Sales Manager and Director of Sales

OSS	CODE	NAME
18	32450	MARRIOTT BOSTON QUINCY
18	34202	HAVEN COUNTRY CLUB
18	43825	L-SUFFOLK UNIV SARGENT LAW
18	43826	L-SUFFOLK U./ 150 CAFE
18	43827	L-SUFFOLK UNIV 20 SOMERSET SMI

OSS	CODE	NAME
16	12683	BABETTES TABLE - VT
16	16140	C.BRAGO PERSONAL ACCOUNT
16	34501	MULLIGAN'S - MANCHESTER, VT.
16	42053	DOWNTOWN GROCERY VT. *RTL*
16	44872	SEASONS RESTAURANT