

## STANDARD OPERATING PROCEDURE

### TAKING AN ACTIVE CUSTOMER AND PUTTING ON HOLD

Dole & Bailey, Inc.

Implementation Date: 04/04/2023

**PURPOSE:** Putting an account on hold while we resolve payment issues.

**RESPONSIBILITIES:** Credit Department & Upper Management

From Main Menu – Click on CUSTOMER MASTER (Note, Customer Master can be found on multiple user options choices. Once found, just make a Favorite and it will appear on the Main Menu)



Enter the customer account number you need to put on **HOLD** and hit enter

The screenshot shows the 'File Maintenance for Customer Master File' form. The 'General Information' tab is active. It contains various input fields for customer data. The 'Customer Code' field is highlighted with a yellow box. Other fields include 'Name', 'Check Name', 'Last Maintained', 'Address 1', 'Address 2', 'City', 'State', 'Address 3', 'Address 4', 'Zip Code', 'Country Code', 'Telephone', 'Fax Number', '1st Contact', 'Password', 'Remote User Override', 'Acronym', 'Cross Ref ID', 'Ship Location', 'Bill to Customer', 'E-Mail Address', 'Vendor Code', 'Our Vendor Code', 'Remit to Address', 'Duns ID', 'Vat Number', and 'Automatic Credit Card ID'. The form has a 'DataView' button and a 'Print' button. The 'Customer Code' field is highlighted with a yellow box.

When your customers General Information comes up you will CLICK **4.PARAMETERS TAB**

File Maintenance for Customer Master File

Default Additional

Exit Clear Write Delete DataView

Customer Code: 41743 Last Maintained: 11/14/22

Name: COLBY COLLEGE - DANA HALL Check Name:

**1 General Information** | **2 A/R Sales Information** | **3 Credit Information** | **4. Parameters** | **5. Custom Data**

Address 1: BON APPETITE/UNIT#32649/COMPAS

Address 2: 5460 MAYFLOWER HILL DRIVE

City: WATERVILLE State: ME

Address 3: *International*

Address 4:

Zip Code: 04901 Country Code: USA

Telephone: (508) 243-3113 Fax Number:

1st Contact: JIM LA CHANCE

Password: Remote User Override:

Acronym: COLBY COLLEGE -

Cross Ref ID:

Ship Location:

Bill to Customer:

E-Mail Address:

Comment:

Special Instructions 1:

Special Instructions 2:

Special Instructions 3:

Special Instructions 4:

Vendor Code:

Our Vendor Code:

Remit to Address:

Duns ID:

Vat Number:

Automatic Credit Card ID: Edit

This screen will pop up and you will use arrow in the **STATUS CODE** box to change the **ACTIVE TO HOLD** or **HOLD TO ACTIVE**

File Maintenance for Customer Master File

Default Additional

Exit Clear Write Delete DataView

Customer Code: 41743 Last Maintained: 11/14/22

Name: COLBY COLLEGE - DANA HALL Check Name:

1 General Information	2 A/R Sales Information	3. Credit Information	4. Parameters	5. Custom Data
Ship Via Code: OT	Price Class Flag: PriceClass	Outside Salesperson: 48	Days to Keep Guide: 0	
Truck Route: 27	Price Class Code: C1	Inside Salesperson: NO	Customer Priority:	
Stop Number: 0	Price Cls Customer:	Account Manager:	Auto Misc. Charge:	
Delivery Time:	Order Type: N	Default Ship-to Code:	Minimum Item Markup: .00	
FOB Code: DLVD	Region Code:	Price Sheet Format:	Customer Classification:	
No. of Invoices: 2		Chain Store Code:	Customer Type: 26	
Status Code: Hold		Step Price Code:	Sub-Category:	
Invoice Cycle: Hold			Group:	
Statement Code:				
Tax Code:				
Retail Code:				
Family Code: COMP				
Alt Br Type: N				
Alt Br Code:				
Alt Br Vendor:				
Ignore Delivery Minimum				
Allow any GP				

When you have selected the status you need you will hit **WRITE** in the gray bar at top  
A box will pop up in middle of your screen to update HIT OK , if you see a screen that shows change the status of All Ship-to's HIT YES

File Maintenance for Customer Master File

Default Additional

Exit Clear Write Delete DataView

Customer Code: 41743 Last Maintained: 04/04/23

Name: COLBY COLLEGE - DANA HALL Check Name:

1 General Information	2 A/R Sales Information	3. Credit Information	4. Parameters	5. Custom Data
Ship Via Code: OT	Price Class Flag: PriceClass	Outside Salesperson: 48	Days to Keep Guide: 0	
Truck Route: 27	Price Class Code: C1	Inside Salesperson: NO	Customer Priority:	
Stop Number: 0	Price Cls C1	Account Manager:	Auto Misc. Charge:	
Delivery Time:	Order Type: N	Default Ship-to Code:	Minimum Item Markup: .00	
FOB Code: DLVD	Region Code:	Price Sheet Format:	Customer Classification:	
No. of Invoices: 2		Chain Store Code:	Customer Type: 26	
Status Code: Active		Step Price Code:	Sub-Category:	
Invoice Cycle: 0			Group:	
Statement Code: 1				
Tax Code: ME				
Retail Code:				
Family Code: COMP				
Alt Br Type: N				
Alt Br Code:				
Alt Br Vendor:				
Ignore Delivery Minimum				
Allow any GP				

When you have selected the status you need you will hit **WRITE** in the gray bar at top  
A box will pop up in middle of your screen to update HIT OK , if you see a screen that shows change the status of All Ship-to's HIT YES

FOLLOW WITH HITTING THE WRITE TAB



Customer Code: 41743

Last Maintained: 04/04/23

Name: COLBY COLLEGE - DANA HALL

Check Name:

## 1 General Information

Ship Via Code: OT  
Truck Route: 27  
Stop Number: 0  
Delivery Time:  
FOB Code: DLVD  
No. of Invoices: 2  
Status Code: Active  
Invoice Cycle: 0  
Statement Code: 1  
Tax Code: ME  
Retail Code:  
Family Code: COMP  
Alt Br Type: N  
Alt Br Code:  
Alt Br Vendor:  
Ignore Delivery Minimum  
Allow any GP

## 2 A/R Sales Information

Price Class Flag: PriceClass  
Price Class Code: C1  
Price Cls Customer:  
Order Type: N  
Region Code:

## 3 Credit Information

Outside Salesperson: 48  
Inside Salesperson: NO  
Account Manager:  
Default Ship-to Code:  
Price Sheet Format:  
Chain Store Code:  
Step Price Code:

## 4 Parameters

Days to Keep Guide: 0  
Customer Priority:  
Auto Misc. Charge:  
Minimum Item Markup: .00  
Customer Classification  
Customer Type: 26  
Sub-Category:  
Group:

## 5 Custom Data

Purchase Order Required	<input type="checkbox"/>	Apply Upcharge	<input type="checkbox"/>	Base Minimum Exception	<input type="checkbox"/>
Dunning Message	<input type="checkbox"/>	Taxable	<input checked="" type="checkbox"/>	UPS Batch Export	<input type="checkbox"/>
Order Acknowledgements	<input type="checkbox"/>	Authorized Items	<input type="checkbox"/>	Immediate Bk Orders Allowed	<input type="checkbox"/>
Back Orders Allowed	<input checked="" type="checkbox"/>	Show Retail Prices:	<input type="checkbox"/>	Job Site Required	<input type="checkbox"/>
Retail Customer	<input type="checkbox"/>	Deposit Required	<input type="checkbox"/>	Exclude PS Surcharge	<input type="checkbox"/>
Restrict Lot Selection	<input type="checkbox"/>	Weight in Kilos	<input type="checkbox"/>	Exclude From ePay	<input type="checkbox"/>
Don't Record Short Ship	<input type="checkbox"/>	Collapse Invoices	<input type="checkbox"/>		
Bill Of Lading Required	<input type="checkbox"/>	COA Required	<input type="checkbox"/>		
		QC Required	<input type="checkbox"/>		