STANDARD OPERATING PROCEDURE

TAKING AN ACTIVE CUSTOMER AND PUTTING ON HOLD

Dole & Bailey, Inc.
Implementation Date: 04/04/2023
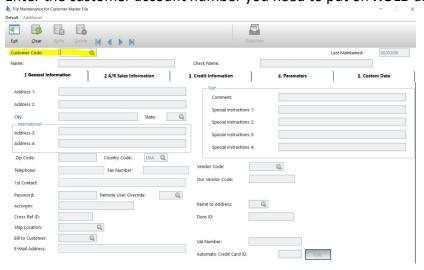
PURPOSE: Putting an account on hold while we resolve payment issues.

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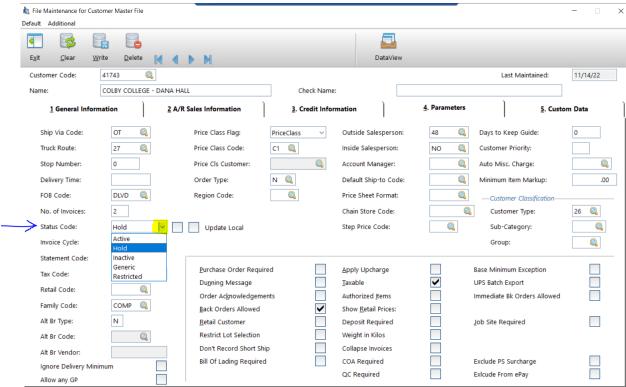
When your customers General Information comes up you will CLICK **4.PARAMETERS TAB**

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**

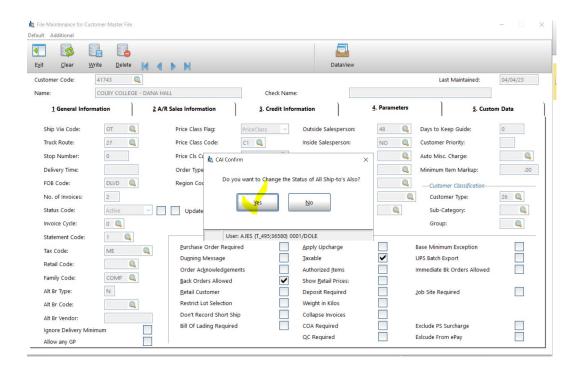When you have selected the status you need you will hit **WRITE** in the gray bar at top
A box will pop up in middle of your screen to update HIT OK , if you see a screen that shows change the status of All Ship-to's HIT YES

FOLLOW WITH HITTING THE WRITE TAB

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 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: Active ▾ ☐ ☐ Update Local   Step Price Code: 🔍   Sub-Category: 🔍

Invoice Cycle: 0 🔍   Group: 🔍

Statement Code: 1 🔍

Tax Code: ME 🔍   Purchase Order Required ☐   Apply Upcharge ☐   Base Minimum Exception ☐

Retail Code: 🔍   Dunning Message ☐   Taxable ☑   UPS Batch Export ☐

Family Code: COMP 🔍   Order Acknowledgements ☐   Authorized Items ☐   Immediate Bk Orders Allowed ☐

Alt Br Type: N   Back Orders Allowed ☑   Show Retail Prices: ☐

Alt Br Code: 🔍   Retail Customer ☐   Deposit Required ☐   Job Site Required ☐

Alt Br Vendor: Restrict Lot Selection ☐   Weight in Kilos ☐

Ignore Delivery Minimum ☐   Don't Record Short Ship ☐   Collapse Invoices ☐

Allow any GP ☐   Bill Of Lading Required ☐   COA Required ☐   Exclude PS Surcharge ☐

                                                                  QC Required ☐   Exlude From ePay ☐