

ARC ID – 6584 New Customers Default to Credit Hold

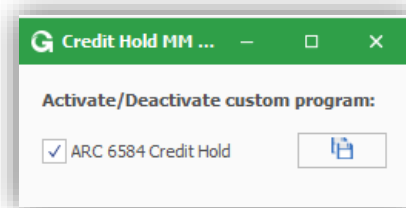
Customer: Metro Steel & Pipe Supply Inc

Business Case: Customer is looking for a program that will automatically place new customers on credit hold if they were created by a user within the Sales group.

A maintenance menu has been created to allow an admin user to turn on/turn off the program. Custom menu item created under AR – File – Credit Hold Maintenance [6584].

Project's step by step

1. After the user clicks on the new custom menu item, the maintenance menu screen will be displayed. The project is active when the 'ARC 6584 Credit Hold' option is checked, project is inactive if it isn't. The user will need to click on the button to save the option's update.



2. After saving a new customer in the Customer Master screen, the customer will be placed on 'Credit Hold' if the user who created the customer is part of the sales team. If the user isn't part of the sales team, nothing will happen.

A screenshot of the "Accounts Receivable Customer (New)" form. The form is divided into several sections. At the top, there are tabs for "TEST" and "Customer", and a "PLA" label. Below this, there are checkboxes for "Buying Group" and "Customer Since" (1/14/2022). The main section contains two columns of fields: "Bill To Address" and "Ship To Address", each with a "Non US" checkbox. Below these are fields for "Name", "Address 1", "Address 2", "Address 3", "Address 4", "Address 5", "City/State/Zip", "Country/County", "Attention", "Country", "Area Cd", "Number", "Telephone", and "Fax". At the bottom, there are sections for "Alpha Sort", "Currency", "Language", "SIC Code", "Credit Limit", "Credit Hold", "Set Credit Hold when Credit Limit is Exceeded", "Shipping Hold", "Set Shipping Hold when Credit Limit is Exceeded", "Allow Shipping Hold to be Modified at the Order Level", "Do Not Change Billing Address When Bill Buying Group Selected", "CRM Restriction Level", and "CRM Assigned User/Group". The "Credit Hold" checkbox is checked. At the very bottom, there are buttons for "Save", "Options", "Comments", "Add'l Ship To", "Contacts", "Buying Grp", "Payment", "Order Notes", and "Taxes".

Process validation

If the user opens the recently created customer, they would be able to validate that the customer was placed on 'Credit Hold'.

- *Important Note*

For a customer placed on 'Credit Hold', the user will need to manually turn the 'Credit Hold' option off for that specific customer once they have finished their internal review.

Accounts Receivable Customer (Update)

TEST Customer PLA Buying Group Customer Since 1/14/2022

Bill To Address ☐ Non US

TEST

1 Address 1

2 Address 2

3 Address 3

Address 4

Address 5

City/State/Zip

Country/County

Attention

Country Area Cd Number Telephone Fax

Ship To Address ☐ Non US

TEST

1

2

3

Address 4

Address 5

City/State/Zip

Country/County

Attention

Country Area Cd Number Telephone Fax

Alpha Sort Currency Catalog Currency Language SIC Code Credit Limit ☒ Credit Hold ☐ Set Credit Hold when Credit Limit is Exceeded

Sort Loc Area Branch Sales Rep Commission Terms NET 10

Carrier Service Type Ship Via 3rd Party Freight

BEST WAY

☐ Shipping Hold ☐ Set Shipping Hold when Credit Limit is Exceeded ☐ Allow Shipping Hold to be Modified at the Order Level ☐ Do Not Change Billing Address When Bill Buying Group Selected

CRM Restriction Level CRM Assigned User/Group

None

< > Save Options Comments Add'l Ship To Contacts Buying Grp Payment Order Notes Taxes

Script 1 Script 2 Script 3

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