ARC ID – 6584 New Customers Default to Credit Hold

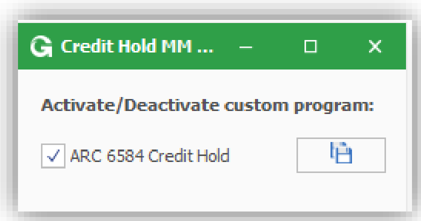
Customer: Metro Steel & Pipe Supply Inc

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.

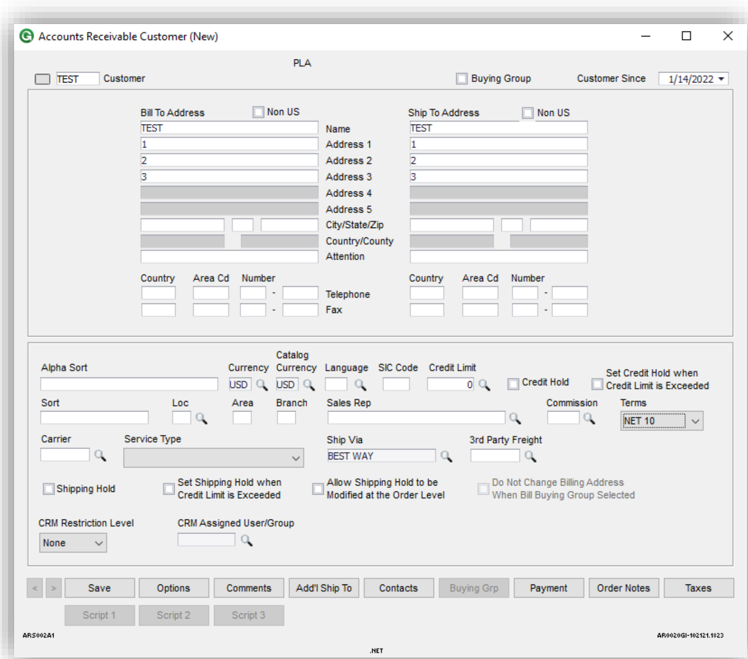
A maintenance menu has been created to allow an admin user to turn on/turn off the program. Custom menu item created under AR – File – Credit Hold Maintenance [6584].

<u>Project's step by step</u>

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.



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.