

Credit Hold

When an account is on credit hold, the customer will not have any new orders shipped to them until the unpaid balance on their account has been paid. If a customer is on credit hold, you'll see this on their account:

You can make quotes for a customer on credit hold, but when you send the quote over let them know that the order will not be shipped and send them any outstanding invoices as well. If they send a PO for the order before the hold is resolved, you can place the order and put it on hold with the reason code "CHOLD" to have the order held until the credit hold is removed.

Once their open invoices are paid, accounts receivable will remove the credit hold from their account which will automatically release all orders with the CHOLD reason. If you find an account with a credit hold that has no outstanding invoices, let accounts receivable know and they can remove the hold.

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