

# Customer AR Support Hold

09/16/2024 3:13 pm EDT

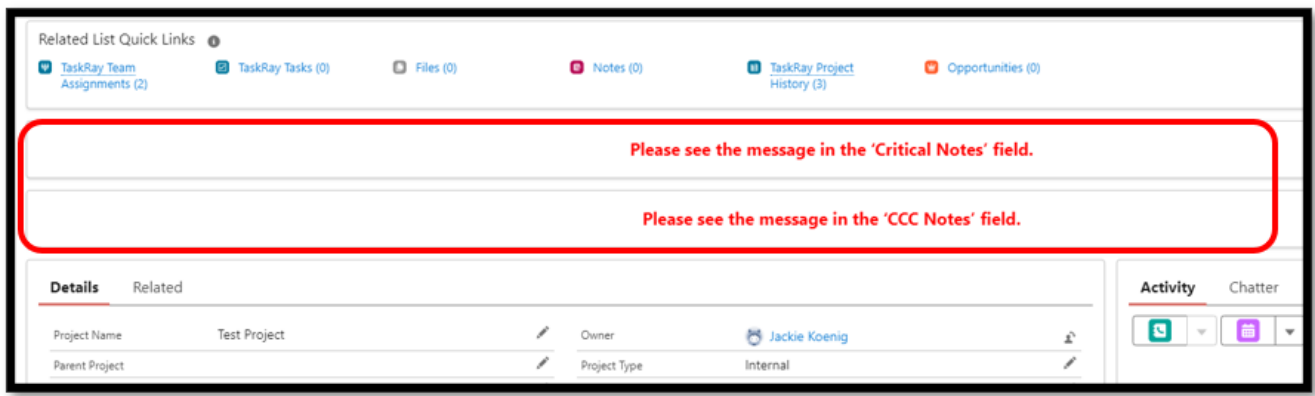
- Purpose
- AR Hold Notification
- Review the Account Card
- Track Hold Duration
- Follow Up With AR

During the course of working on a customer project, a warning is received that the customer is on Support Hold. This document provides information on what the message means, how to review the customer account for information, and follow up with the AR team to confirm the status.

The flowchart linked in the files section of this article guides the process. Open the flow chart [here](#)

## Top of Document

After opening a project, you may see a warning banner appear:

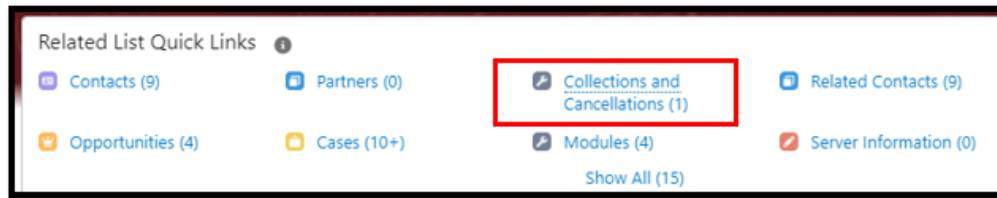


This indicates that the customer account has been placed on hold for past-due invoices for the product listed. No service work should be performed for customers on support hold. However, they may be on hold for one product, but not for others.

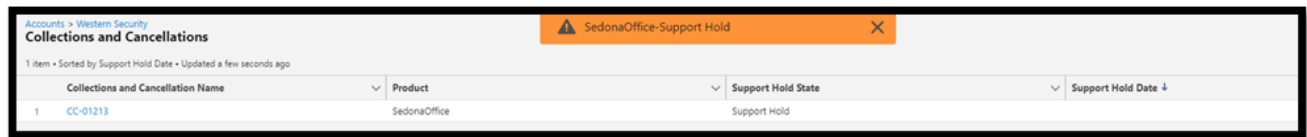
The customer card can be reviewed to determine product hold information.

## Top of Document

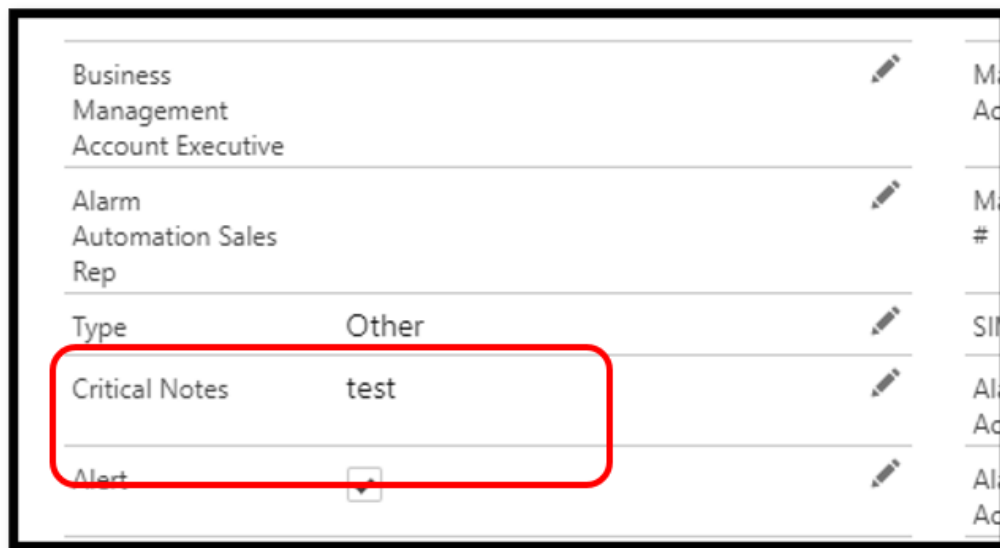
To determine which product is on hold, open the customer's account card, look in the Related List Links section for Collections and Cancellations, then click the link:



Select and review the related requests from the list for more information on holds:



The Critical Notes field will also have information:



## Top of Document

When the project is placed on hold, the Project Manager will update the project as follows:

- Project Status Reason = Stalled
- Dependency = Support Hold

The PM will notify the customer under this task that the project is on hold due to AR issues and refer the customer to the appropriate AR Representative to resolve.

The PM will also add a task to the project:

- Task Name: Support Hold
- Start Date: Today
- End Date: 60 days out

The PM will continue to monitor the hold status for 60 days (end date of task) and note in the task Chatter any review notes or updates. After 60 days if the hold has not been lifted the PM will move the project to the Director of Professional Services by updating the following fields

- Project Status Reason = Stalled
- Dependency= Director of Professional Services

The task should remain open until the Support Hold is lifted. The task start date and task completion date will then track the duration of the delay.

The Director of Professional Services will continue to monitor the project status and inform the PM when it is ready to resume, or will move to a Contract Cancellation or Customer Terminated status

To follow up with AR to confirm the hold status or add details to the hold status follow the steps below:

1. Open the related Collections and Cancellation item from the list referenced above
2. In the Chatter section, add your details and post
  1. @mention the appropriate AR resource for the product line as listed below

If no response is received and an email follow-up is required, contact the following individuals:

- Business Management Applications - [perennial\\_ar@boldgroup.com](mailto:perennial_ar@boldgroup.com)
- Alarm Monitoring Applications - [ar@boldgroup.com](mailto:ar@boldgroup.com)

[Top of Document](#)

---