

What to do with Support Cases when the Customer is on Support Hold

06/16/2025 5:07 pm EDT

Link to Billing and A/R Contacts article: <https://securityandalarminternalkb.knowledgeowl.com/help/billing-and-accounts-receivable-contacts>

Step 1 - Please confirm that the Support Hold was placed PRIOR to the case being submitted. If the Support Hold was placed after the customer submitted the case, we can proceed with assisting them on that case. You can verify this by going to the customer's account profile and clicking "Collections and Cancellations" under "Related List Quick Links", as shown below. The Support Hold Date is listed in the far right column.

The screenshot shows the Salesforce interface for the account 'Systems Design Group (SDG)'. The 'Related List Quick Links' section includes 'Collections and Cancellations (1)'. A red message states: 'Please see the message in the 'CCC Notes' field.' The 'Details' tab is active, showing 'Account Information'. Below this, the 'Collections and Cancellations' section is expanded, displaying a table with one item:

1	Collections and Cancellation Name	Product	Support Hold State	Support Hold Date
1	CC-01672	SedonaOffice	Support Hold	6/15/2024

Step 2 – Return to the case and go to “Activity” to send the customer an email notification regarding the Support Hold. Use the email templates to send the “Support Hold Notification” template. This will pull all the case information required to fill in the blanks of the email before sending it to the customer to notify them of the Support Hold. You do **not** need to enter the information inside these bracketsArray .

Insert Email Template

Select a template for: **Contacts** **Leads** **Cases**

Templates: All Lightning Templates

Template Folders: All

Search: Support

Name	Description	Template Folders
Support Hold Notification	Support Hold Notification	Support Templates
Meeting Invite Requested	Support Meeting Invite Requested	Services Email Templates
Top 25% First Response Email	We have received your support request	Services Email Templates

Cancel

Please see the message in the 'CCC Notes' field.

Details Related **Activity**

Email Post New Task Log a Call Stages Email Create Opportunity

From: Sedona Office Support <sedonaoffice_support@boldgroup.com>

To: Courtney Petherick, X

Bcc: courtney.petherick@boldgroup.com X

Subject: Bold support case **CaseCaseNumber** status notification

Hello **CaseContactName** -
 Thank you for reaching out to us regarding your recent case **CaseCaseNumber** regarding **CaseSubject**. After carefully reviewing the details, we have determined that your account is currently on support hold. We apologize for any inconvenience this may cause.
 To resolve the hold status and proceed with your case, we are referring it to our accounting team. They will work diligently to address the underlying issues and remove the hold from your account as soon as possible. Please rest assured that resolving this matter promptly is our utmost priority.
 In addition, we recommend contacting your own accounting department to inform them about the current status of your account and that it is hindering you from receiving necessary support. This will help ensure that both parties are aware of the situation and can collaborate effectively in resolving the matter.
 Thank you for your understanding and cooperation. We appreciate your patience while this accounting matter gets resolved.

Send

Step 3- Once the customer has been emailed and notified of the Support Hold, click “Transfer” along the top of the case page. Click the dropdown menu under “Transferred To” and select “Support Hold”. Click “Save”.

Test

Follow Edit Transfer Add Products Close Case Close Create Opportunity View Case Hierarchy

View Case Hierarchy

Related List Quick Links

- Case Comments (0)
- Attachments (0)
- Timeline (0)
- Files (0)
- Support Notes (0)
- Related Cases (0)
- Links (0)
- Open Activities (0)
- Activity History (0)
- User History (0)
- Support History (0)
- Related Cases (0)

Please see the message in the 'Critical Notes' field.

Please see the message in the 'CCC Notes' field.

Details Related Activity

Case Information

Case Number	Case Name	Case Owner	Case Status	Case Type	Case Category	Case Sub-Category	Case Product	Case Sub-Product
00115286	Support Hold Notification	Courtney Petherick	Open	Support	Support	Support	Support	Support

Account Details

Account Name	Account Type	Account Status	Account Category	Account Sub-Category	Account Product	Account Sub-Product
Sedona Office Support	Support	Open	Support	Support	Support	Support

Q Search...

Transfer

Status: Transferred

Subject: Test

Description: Please assist with this test error

Category: --None--

Steps to Reproduce Issue/Error

Transfer Details

Cancel Save

This case has now been transferred to the Support Hold queue for our Accounting team to review.