Customer Status. What is Active and Inactive do on the Status of a customer or company?

The **ACTIVE** and **INACTIVE** options in CUSTOMER STATUS and COMPANY STATUS turns a customer or company into an **ACTIVE** status or an **INACTIVE** status.

Â

ACTIVE status = The customer or company account is able to be worked on, new orders and emails can be issued to the customer and that the customer's account is working.

Â

INACTIVE status = The customer or company account is closed, is no longer available or has been closed.Â Check history or important notes section to see why a customer or company has an **INACTIVE** status.Â In effect the account is closed.

Â

All customer accounts when created or started will have an **ACTIVE** status.Â Most staff are able to close a customer or company account.Â However customer or company accounts can only be reopened with the approval of a supervisor.Â

Â

What to do if you accidentally make a customer or company account INACTIVE?

1. Immediately contact your supervisor and inform them of the error.Â They will need to know the customer full name, customer ID number and the company name.
2. The supervisor will find the closed (**INACTIVE**) account and will reopen.
3. It is important that if the account is incorrectly or by accident made INACTIVE, do inform your supervisor.

Â

What to do if a customer or company account is INACTIVE, but the customer wishes to reopen the account?

1. Place the customer on hold and inform them that you will require permission from your supervisor to reopen the account.
2. Contact your supervisor and inform them of the error.Â They will need to know the customer full name, customer ID number and the company name.
3. The supervisor will find the closed (**INACTIVE**) account and will reopen.
4. Once the account is reopened, the supervisor will inform you.
5. Proceed with servicing the customer.

Unique solution ID: #1222
Author: n/a
Last update: 17-Jul-2016 01:58