



## Customer Holds

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### Overview

Customer Holds is a tab located on the Customer Card in SalesPad Desktop. This tab allows users to manage Sales Document Holds for customers directly from the Customer Card. In this document, you will learn how to add and remove holds from the Holds tab in the Customer Card. Any relevant securities will be noted at the end of the document.

### Usage

Customer holds can be found on the Customer Card as a tab titled Holds.

Customer Search x Customer: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Print Dynamics GP QUOTH QUOTE STDORD ORDER STDINV INVOICE RTN RETURN

Customer Properties

Customer: AARONFIT0001  
Customer Name: Aaron Fitz Electrical  
Cust Class: USA-ILMO-T1  
Price Level: RETAIL  
Pay Terms: NET 30  
Sales Rep: West, Paul  
Sales Terr:  
Discounts: SCBB2  
Currency: Z-US\$

Primary Address Information

Bob Fitz P1: (425) 555-0101  
One Microsoft V FX: (312) 555-0101  
Seattle, WA 981

Ship To Address Information

Bob Fitz P1: (312) 555-0102  
11403 45 St. So.  
Chicago, IL 60601

Open Sales Documents

Type	Doc#	Doc Date	Batch	PO	Total	Req Ship
QUOTE	QTEST1024	4/12/2017	EMAIL		34,240.00	
FULFILLME...	FULORD1008	4/12/2017	FULORD		192.45	4/12/2017
FULFILLME...	FULORD1006	4/12/2017	FULORD		5,828.55	4/12/2017
FULFILLME...	FULORD1003	4/12/2017	FULORD		49.85	4/12/2017
FULFILLME...	FULORD1000	4/12/2017	FULORD		358.25	4/12/2017
QUOTE	QTEST1022	3/5/2017	SALES QUO...		85.55	
ORDER	ORDST2266	9/8/2016	RULE		0.00	9/8/2016
ORDER	ORDST2265	9/7/2016	NEW		2.50	9/7/2016

Child Accounts Equipment Audit Item Sales Item Numbers Default Item Reps Group Pricing Interactions Opportunities Resources PayFabric Transactions PayFabric Wallet **Holds**

Hold Code

APPROVAL

User ID	Last Update On	Cant Fulfill	Cant Post	Cant Print	Cant Transfer	Is Deleted	Sales Doc Num	Sales Doc Type
Salespad	5/20/2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORDST2239	ORDER

### Adding Holds

In order to add holds you will need to set the *Can Add Customer Holds* sub-security for the *Customer Holds* security to True. A hold can be added to all sales documents by selecting the hold type in the dropdown located in the toolbar on the tab and then pressing the **Add Holds to All Documents** button. The user will then be prompted to add holds on all open Sales Documents for the customer.

### Remove Holds

In order to remove holds you will need to set the *Can Remove Customer Holds* sub-security for the *Customer Holds* security to True. A hold can be removed from a customer by selecting the Sales Document and the hold in the Customer Holds grid, and then clicking **Remove Selected Holds**. The user will receive a confirmation prompt to remove the hold. Once confirmed, the hold will be removed from the Sales Document.

### Security

*Customer Holds\** - Allows users to see the Holds tab on the Customer Card

**Note:** Securities with an asterisk (such as *Customer Holds*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.