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Customer Holds

Megan De Freitas - 2024-11-22 - Sales

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 Propert	ties			 Primary Address I 	nformation	Open Sales Documents								
Customer:	AARONFIT0001			Bob Fitz One Microsoft V	P1: (425) 555-0101 FX: (312) 555-0101	< >	Type	Doc#	Doc Date 🔻	Batch	PO	Total	Reg Ship	
Customer Name:	Aaron Fitz Electrical ···· USA-ILMO-T1 V RETAIL V		Seattle, WA 98	- xi (511) 555 5151	QUOTE FULFILLME		0TEST 1024 FULORD 1008 FULORD 1006	4/12/2017 4/12/2017 4/12/2017	EMAIL FULORD FULORD			4/12/2017	^	
Cust Class:														
Price Level:												4/12/2017		
Pay Terms:	NET 30		~				FULFILLME	FULORD 1003	4/12/2017	FULORD		49.85	4/12/2017	
Sales Rep:	West, Paul	West, Paul ···		- Ship To Address Information			FULFILLME	FULORD 1000	4/12/2017	FULORD		358.25	4/12/2017	
Sales Terr:				Bob Fitz 11403 45 St. Sol	P1: (312) 555-0102		QUOTE	QTEST 1022	3/5/2017	SALES QUO		85.55		
Discounts:	SCBB2		~	Chicago, IL 6060			ORDER	ORDST2266	9/8/2016	RULE		0.00	9/8/2016	
Currency:	Z-US\$	Z-US\$					ORDER	ORDST2265		NEW		2.50	9/7/2016	
							·····							
child Accounts	Equipment	quipment Audit Item Sales		s Item Numbers Default Item P		os Group Pricing	Interactions	Opportunities	Resources	PayFabric Transactions		PayFabric Wallet	Holds	
old Code 🔺	• 🌵 A	dd Holds	to All Doc	uments 💥 Remo	ove Selected Holds	🤁 Refresh 🛛								
ser ID	Last Update On		Ca	ant Fulfill	Cant Post	Cant Print	rint Cant Transfer		Is Deleted S		Sales Doc Num Sa		ales Doc Type	
APPROVAL														
lespad	5/20/2016							\checkmark		OR	DST2239	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.