



Disable Creation of New Documents for Customers on Hold

Megan De Freitas - 2024-11-22 - Sales

In both SalesPad and Dynamics™ GP, a customer can be placed "On Hold" for multiple reasons. Even with the customer On Hold check box checked, nothing out of the box prevents a user from creating a new sales document for that customer.

SalesPad can call an "On Load" script any time a customer card is loaded. The following script will prevent users from creating new documents for customers on hold:

```
if (args.Customer.val_On_Hold == true)
{
args.NewQuoteButton.Enabled = false;
args.NewOrderButton.Enabled = false;
args.NewInvoiceButton.Enabled = false;
args.NewReturnButton.Enabled = false;
}

return "";
```

Paste the script into **Modules > Security Editor** under Customer Card, OnLoad Script:

Security

Select All Select None Copy From...

Name

Name	
customer car	
Customer Card*	<input checked="" type="checkbox"/>

[X] [v] [Name] Like 'customer car%' And [] = 'Checked' Edit Filter

Misc

Can Create Invoices	True
Can Create Orders	True
Can Create Quotes	True
Can Create Returns	False
Show Cost	False
Visible Invoice IDs	*
Visible Order IDs	*
Visible Quote IDs	*
Visible Return IDs	*

Scripts

OnLoadScript

Press Enter to begin a new line.
Press Ctrl+Enter to accept Text.

Important Reminders and Suggestions:

- This script is considered "as is" and any changes/modifications that might be needed would require a signed quote.
- If you are required to change a Security Option or Setting, your users will need to restart SalesPad before the changes take effect.
- Please install this on a test machine and run it against a test database before using it on your live system.
- You should always make sure you have a database backup prior to installing new software.
- Database Triggers, after final delivery, are the responsibility of the dealer/customer. SalesPad will not be responsible for maintaining copies of custom database objects.
- C# scripts, after final delivery, are the responsibility of the dealer/customer.