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Sales Document Holds

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Overview



Process holds are manually set up through Dynamics GP but can be added or removed from documents from within SalesPad. This document explains how to remove a hold from a sales document or add a hold to a sales document.

Usage

Open a sales document. If the document currently has a hold on it, an indication will appear under the Additional Properties on the sales document header:

The screenshot shows the SalesPad interface for a sales document. On the left, the 'Shipping Address' section lists 'Roscoe's Chicken and Waffles' with contact information. Below it is a 'Ship Complete' checkbox. The 'Additional Properties' section shows 'Batch/Q:' as 'SMARTPRINTING', 'Price Level:' as 'RETAIL', and 'Discount:' as 'REDDOWN'. Below these, a red arrow points to a line item labeled '1 Hold: 1'. On the right, the 'Totals - GM: [\$546.80] [45.20%]' section displays various charges and totals: 'Misc Charge: 0.00', 'Discount: 0.00', 'Freight: ... 0.00', 'Tax: 0.00', 'Total: 1,209.80', and 'Payment: 0.00'. A 'Ship' button is visible in the top right corner.

The indication will note the number of holds on the document and list the type(s) of hold(s). To access the hold(s), either open the Holds tab on the sales document directly, or click on the indication to open the Holds tab:

Line Items	Notes	Addresses	Holds	User Fields	Audit	Related Documents	Purchases	FedEx Quote	PaperSave								
<div>  New  Delete </div> <table border="1"> <thead> <tr> <th>Hold Code</th> <th>Deleted</th> <th>User ID</th> <th>Last Update On</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td></td> <td>2/24/2011</td> </tr> </tbody> </table>										Hold Code	Deleted	User ID	Last Update On	1	<input type="checkbox"/>		2/24/2011
Hold Code	Deleted	User ID	Last Update On														
1	<input type="checkbox"/>		2/24/2011														

The Holds tab will list any holds on the document, whether or not the hold has been deleted, the user who entered the hold, and when it was last updated.

From this tab you can create a new hold or delete a hold:

New

Clicking the New button will display a list of holds from GP that you can assign to the sales document:

Process Holds

Choose a hold to assign.

Hold Code
1
ADDRESS
APPROVAL
CHECK
CREDIT
QUALITY

Select a hold type and click OK. The new hold will display on the Holds tab underneath any prior holds.

Delete

Clicking the **Delete** button or checking the box in the Deleted column will delete the selected hold. The hold will be deleted, but will still display on the document with a line through it. Save the document to finalize this change. To make a hold active again, remove the check from the box or click the Delete button on a deleted hold.

Line Items	Notes	Addresses	Holds	User Fields	Audit	Related Documents	Purchases	FedEx Quote	Page
New Delete									
Hold Code	/	Deleted	User ID	Last Update On					
1		<input type="checkbox"/>		2/24/2011					
APPROVAL		<input checked="" type="checkbox"/>	brandon	6/10/2011					

Security

To allow users to view/modify holds, enable *Sales Document Holds* in the Security Editor. To allow a user the ability to remove their own holds as well as other users' holds, the sub-settings can be changed:

Can Remove Holds - Allows a user to remove all holds

Can Remove Own Holds - Allows a user to remove their own holds

Note: If you set both options to True, users will be able to remove others' holds but not their own. To allow all users to remove ALL holds, set *Can Remove Holds* to True, and *Can Remove Own Holds* to False.

To allow users to add holds to a sales document, enable *Add Sales Document Holds* in the Security Editor.