

PROCESS HOLDS

Setting up process holds in Sales Order Processing

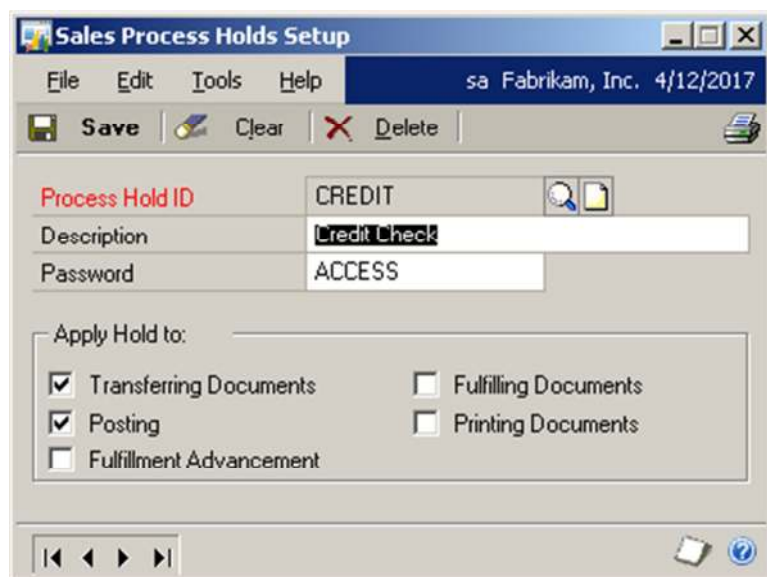
You can use the Sales Process Holds Setup window to create process holds to assign to your sales documents. Process holds are user-defined restrictions that control the processing of sales documents at different stages of the sales cycle. For example, you can set up process holds to:

- Require a manager's approval before a return can be posted.
- Prevent posting of documents until a manager approves the transactions.
- Restrict the printing of invoices until addresses have been verified.
- Stop the order fulfillment process because a part has been recalled by the manufacturer.
- Prevent the transferring of a quote to an order if the customer is over its credit limit.
- Stop a document status from advancing to the next tracked status.

You can set up passwords to further restrict processing. The user must enter the password to remove holds from documents. If you don't use passwords, you can set up a process hold to remind the user to complete a task before processing a sales document. Once the task is completed, the user must remove the hold from the document before processing occurs. You can apply process holds to any document type.

To set up process holds:

1. Open the Sales Process Holds Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Process Holds)



2. Enter a name and description for a process hold. You can assign a password to remove this process hold.

3. Mark any of the processes you want to restrict with this process hold.

Transferring Documents Mark to stop the transfer of documents from one document type to another until the hold is removed. (This option has no effect on return documents since they cannot be transferred to other document types.)

Posting Mark to stop the posting of invoices or returns until the hold is removed. If you have orders that contain a deposit amount, the deposit amount will be posted when the document is saved, regardless of whether a posting hold has been assigned.

Fulfillment Advancement Mark to stop the advancement of fulfillment order document statuses until the hold is removed.

Fulfilling Documents Mark to stop the fulfillment of orders or invoices until the hold is removed.

Printing Documents Mark to stop the printing of documents until the hold is removed. If you restrict the printing of an order, invoice, or fulfillment order, the picking ticket and packing slip won't be printed either. This will eliminate the possibility of shipping items for documents that are on hold.

4. Choose Save to save the information you've entered.

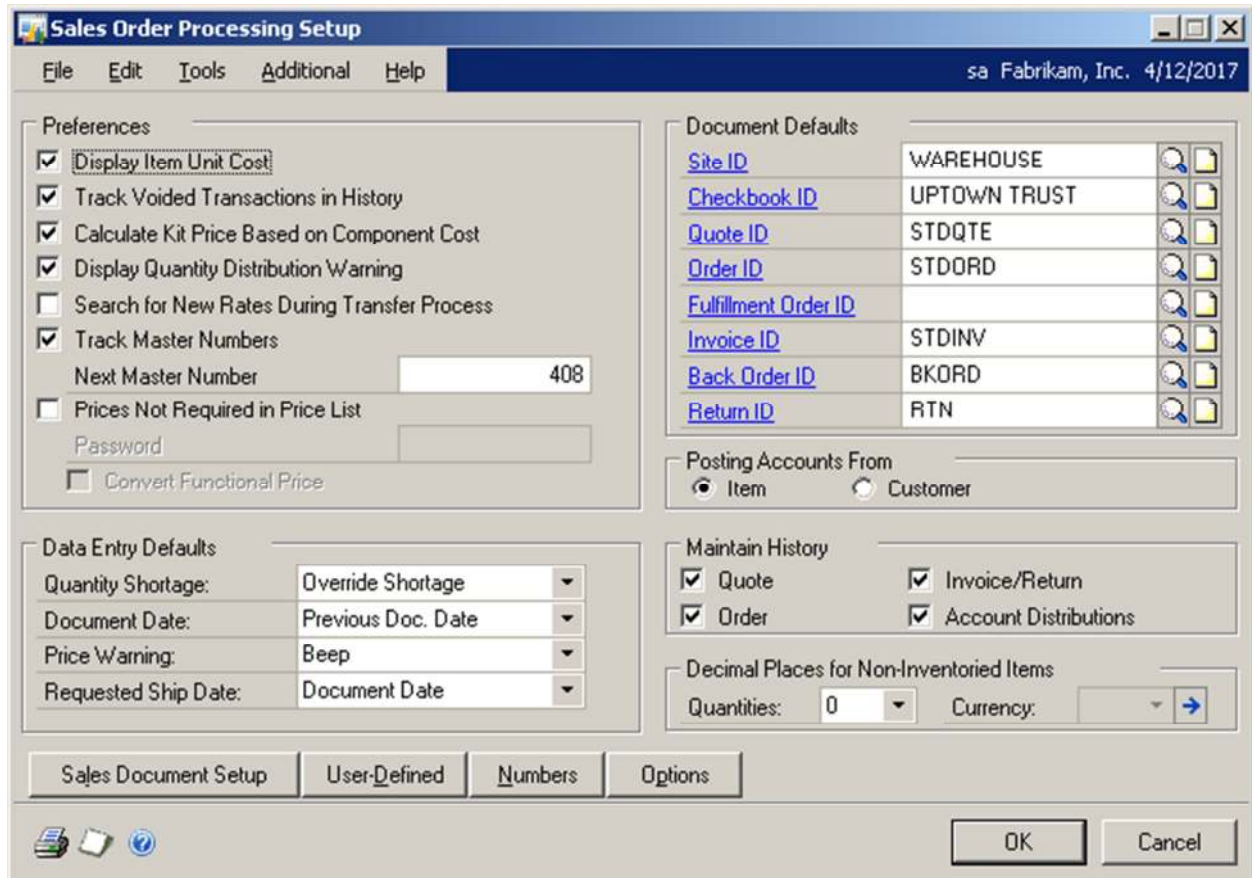
Assigning process holds to multiple documents in Sales Order Processing

You can assign process holds to multiple sales documents. Process holds are user-defined restrictions that control the processing of sales documents at different stages of the sales cycle. You can use process holds to restrict the transfer, fulfillment, printing, or posting of documents. If you're using sales fulfillment workflow, you also can use process holds to restrict the advancement of a document status of a fulfillment order. Process holds assigned to an order, fulfillment order, invoice, or return also apply to the picking ticket and packing slip associated with the document.

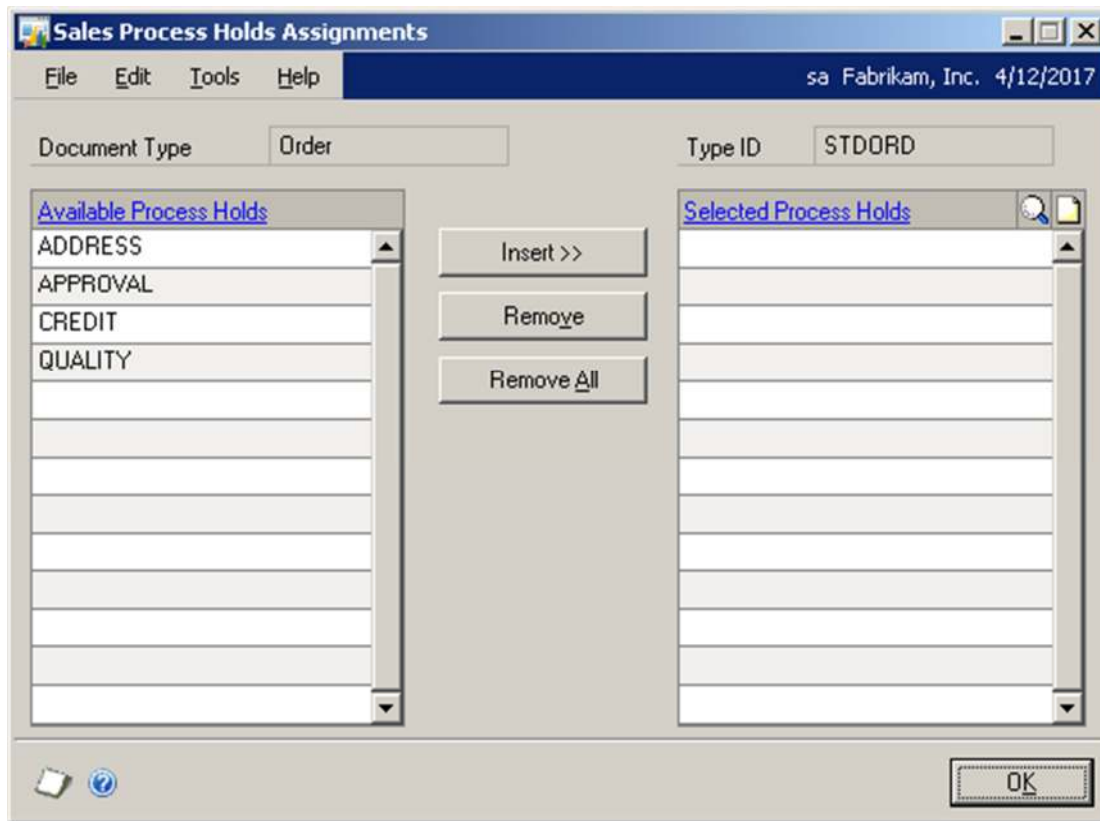
A process hold also can be assigned to a document ID when you set it up. For more information about assigning process holds to a document ID

To assign a process hold to a document ID:

1. Open the Sales Process Holds Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Sales Order Processing)



3. Click on the Holds button.

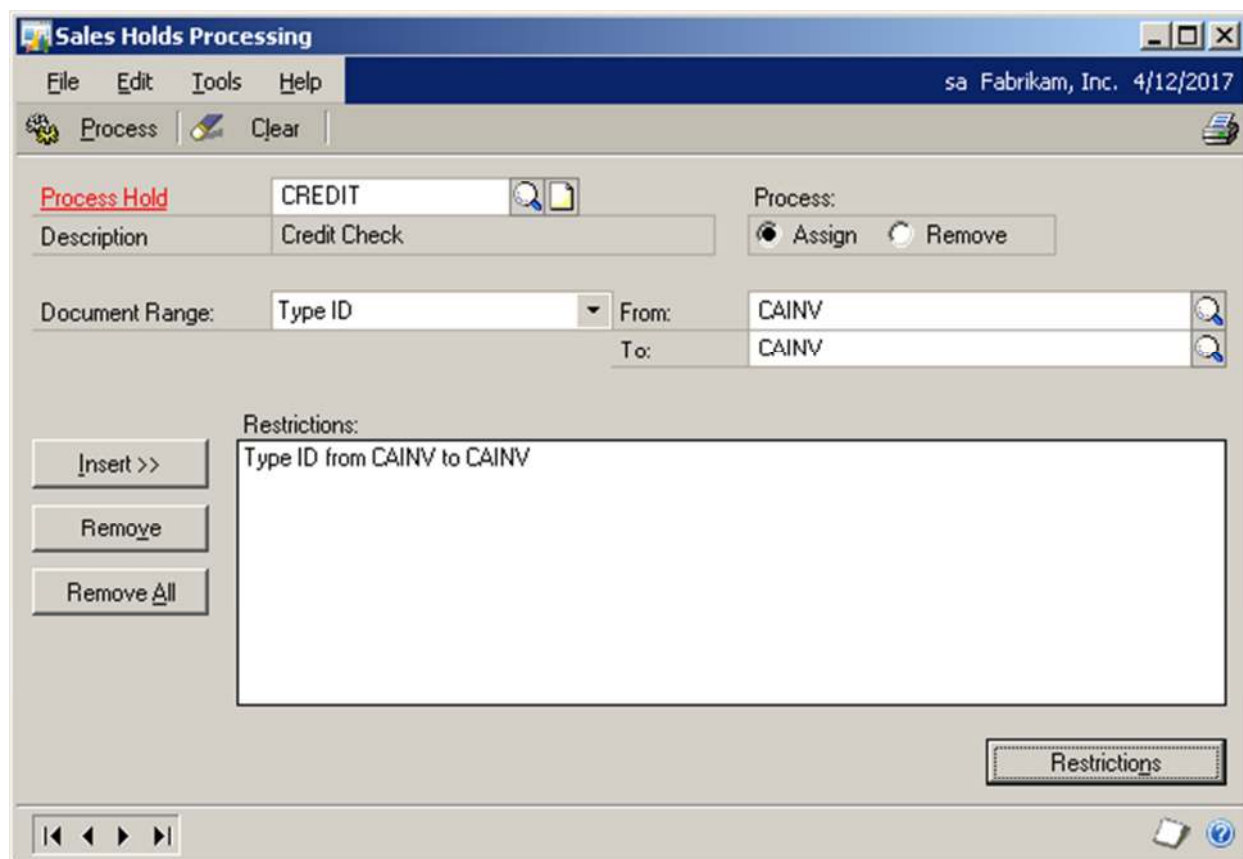


4. Select and insert the available process holds you want to assign to this Document Type ID
5. Click on OK
6. Choose Save to save the information you've entered.

If you are using sales quote workflow, you can't apply a hold to quotes that are pending approval unless you are the current approver.

To assign or remove process holds to multiple documents:

1. Open the Sales Holds Processing window.
(Transactions >> Sales >> Holds Processing)



2. Enter or select a process hold.
3. Mark Assign *or* Remove.
4. Define a range restriction of documents to assign or remote the hold to and choose Insert.
5. Choose Restrictions to view the range of the documents you've chosen. You can remove an individual document from the range by unmarking Process for the document.
6. You can choose File >> Print or the printer icon button to print the Holds Processing Preview report before processing the holds.
7. Choose Process to assign the process hold.