



There are dozens of little tips and tricks for using your Great Plains system that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your September 2005 tip:

Assigning Process Holds to a Document

You can assign process holds to individual 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 a document. Process holds assigned to an order, invoice, or return also apply to the picking ticket and packing slip associated with the document.

If you're using sales workflow, you can also use process holds to restrict the advancement of a document status of a fulfillment order.

You must set up process holds in Sales Order Processing before they can be assigned to a document. A process hold also can be assigned to a document ID when you set it up.

To assign process holds to a document:

1. Open the Sales Transaction Entry window.
(Transactions >> Sales >> Sales Transaction Entry)
2. Enter or select a document.
3. Choose Holds to open the Sales Process Holds Entry window.
4. Enter or select the process hold to assign to the document and choose Assign. The process hold will be added to the Assigned Holds list.
5. Choose OK to close the window.

I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

Marcia Nita Doron
Marketing Director
[Altico Advisors](#)
2 Mount Royal Avenue, Suite 410
Marlborough, MA 01752
508-485-5588 x107
mdoron@alticoadvisors.com
www.alticoadvisors.com