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	S1 Hold o	n Sales Orders in JD		
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- I. <u>SUBJECT</u>: How to place and remove S1 Holds on Sales Orders in JD Edwards.
- **II.** <u>**PURPOSE**</u>: To prevent a sales order from advancing to pick status in JD Edward.
- **III.** <u>**PERSONNEL AFFECTED:**</u> All Customer Relations Advocates, Customer Relations Supervisors, and Customer Relations Manager.
- IV. <u>RESPONSIBILITIES</u>: Customer Relations Advocates, Customer Relations Supervisors, and Customer Relations Manager are all responsible for understanding how to place a sales order on customer service hold in order to prevent that order from advancing to print pick slip/shipment confirmation status (540/560) and how to release the sales order from hold.

V. <u>INSTRUCTION:</u>

1. In order to prevent a sales line/order from advancing to print pick slip/shipment confirmation status, Customer Relations has the ability to place that sales order on hold. This is a process known as S1 Hold. JD Edwards can accommodate this either during initial order entry or by modifying an existing order.

Please Note: There is no expiration date on a hold of this type. The order will never advance to print pick slip/shipment confirmation status unless the release process is initiated and completed. The entire order is held when put on S1 hold. This hold cannot be applied at the line level.

S1 Holds can be placed at the time a new order is entered or a subsequent time after the order has been completed.

a. To place an order on S1 Hold during the initial order entry process, in JD Edwards from the NTN Bearing Tasks Menu, Sales folder, select Sales Order Process, then, Sales Order Entry folder, then click Add. (You may also access through your "Favorites") To add to Favorites select field and right click arrow, then add to favorites.

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ternriseOne Menu	Sale	s Orde	er Enti	y - Cus	stome	r Serv	vice In	quiry						[] [?	1 6
en Applications 🕑	Select	Find	Add	Сору	Close X	Eorm	Row								
Sales Order Header Vork with Item availability and Price 3	Cus	tomer	Service	Inquiry	Addit	ional Se	elections	7							
Customer Service Inquiry 2 Vork with Item availability and	()rder Ni	umber	*		*	×			Bra	nch/Pl	ant	NTN		
Price 1	C	Justome	er PO	*											
Open New Window	1	em Nur	nber	*											
avorites ITN Bearing Tasks > Address Book > Manufacturing Accounting > Product Costing	5	3old To 3hip To		*								Cust	id Back Oro omer Item	ler Quantity	
Work Order	No re	cords	ound.					Cust	omize Grid	ORDER E	NTRY	5		v 1	
Non-Stock Purchases															
> Inventory		R	0.5	ABC		Zone	Orio	jinal	Original	Ŀ	n	Line	Order	Order	

- b. On the sales order header screen, note the Hold Code field, enter S1 in that field; click OK.
- c. Resume data entry for other header fields (see CS-IAM-020 for reference).When the order is complete, view the Hd Cd to see if S1 populated in the field.See step 2d for visual example.

			Branch/Plant NTI	N
Messages			Dates	
Address Nun	ibers	This Order Placed On Hold	Order Date	02/19/201
Ship to Sold To	12536 12535	BARTLETT BEARING CO INC BARTLETT BEARING CO INC	Requested Date Requested Time	02/19/201
Customer P Print Messau Hold Code Tax Area/Co	2 81520000 ge S1	BLANK "DO NOT CHANGE Sales Order Hold	Price Pickslip Invoice Copies Ordered By Taken By	1 J SMITH 812DEMO

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d. To place an existing order on S1 Hold, go to NTN Bearing Tasks menu, (or from your Favorites menu, if you have saved it there), Select Sales, Sales Order Entry folder. Enter sales order number and place an asterisk * in the Branch/Plant field. Click Find. When the order is located you will want to modify the order.

ORACLE		
EnterpriseOne Menu 😰 🗖 🗖	Sales Order Entry - Customer Service Inquiry	
Open Applications C - Customer Service Inquiry Open New Window	Select Find Add Copy Close Form Bow Tools	
 ▷ Favorites ▷ NTN Bearing Tasks ▷ Address Book ▷ Non-Stock Purchases ▷ Inventory ▽ Sales 	Order Number 1780030 * * Customer PO Item Number *	Branch/Plant *
Sales Order Fifteess Sales Order Entry Reprint Invoice Sample Orders Blankets	Sold To *	Extend Back Order Quant Customer Item

e. Check any of the boxes on the far left of the sales order line, click the Row button and from the automatic drop down display, highlight and click Order, then select and click SO Header Revision. The order will display the Sales Order Header revisions screen that allows editing.

Sele	ct Find /	Add Copy	v Close Form		ols		
Ci	ustomer Ser	vice Inquir	y Additional :	Sele Custo	mer 🕨		
	Order Num	iber	1780030	Order		SO Header Revision	h/Plant
	Customer I Item Numb	PO er	*	/		Sales History SO Dates SO Address Numbers	
	Sold To Ship To		*			WO Revisions Order Address Additional Info	Ex
Rei	cords 1 - 2		1			Sales Ledger Online Invoice Attachments Ship and Debit	L Cl
	Hd Cd	Line	Order Date	Order	Quan	Pricing History Print Pick Slip	2nd Item Jumber
		7.000	11/08/20	10 178003	0	Generate Proposal Pref Resolution	002ZZC3/L
	Σ					Advanced Preferences Work with Shipment	

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f. From the Sales Order Entry – Sales Order Header screen, locate the Hold Code field.

ales Order Entry - Sales Order Header K Cancel Form Iools		
Order Number 1780030 SL 00001 Sales Order Header Additional Header Information	ranch/Plant NTN	
Address Numbers Address Numbers Ship to 12536 Q BARTLETT BEARING CO INC PART AT DEARING CO INC	Dates Order Date 11/08/2010 Cancel Date	
Sold To 12535 BARILETT BEARING COUNC Customer PO 8153826/7 Print Hessage BLANK "DO NOT CHANGE - Hold Code Blank - Hold Codes 42/HC Tax ArearCode . Tax Certificate No. .	Requested Time 0 Invoice Copies 1 Ordered By GMCDONALD Taken By AS400UBE) '

g. In the Sales Order Header screen, enter S1 in the Hold Code field; click OK. If this screen displays the message *"Sales Order Hold"* next to Hold Code field, this is the first step in the order hold process. Click OK twice to finalize this request.

	OK Cancel Form Tools
	A Warkings
	Issues (click each label for more information):
	Please look for the highlighted fields, correct the entries, and resubmit your request.
	Order Number 1780030 SL 00001
	Sales Order Header Additional Header Information
	Bra
	Messages 1
	This Order Placed On Hold
	Address Numbers
	Ship to 12536 BARTLETT BEARING CO INC
	Sold To 2535 BARTLETT BEARING CO INC
/	Customer PO 8153826/7
	Print Message BLANK "DO NOT CHANGE
	Hold Code S1 Sales Order Hold
	Tax Area/Code
h.	You are
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returned to the Customer Service Inquiry screen. Click Find to refresh the data. Check to see if the Hd Cd field reflects S1. If yes, then order has been successfully placed on hold. In the example below, the order is now on hold.

Sales Order Entry Select Find Add	- Customer Ser	vice Inquiry Row Tools			
<u>v</u> @ +		# 			
Customer Service In	quiry Additional Se	lections			
Order Number	1780030	*		Branch/Plant *	
Customer PO	*				
Item Number	*				
Sold To	*			Extend Back Or	
Ship To	*				
Records 1 - 2	-	-		Gustomize Grid PATTI	
					í literatura de la companya de la co
Hd Line	Order Date	Order Number Quar	NTN Customer Part#	2nd Item Number	
S1 7	000 11/08/2010	1780030	20 6002ZZC3/EM	6002ZZC3/L627[T100]	

2. To remove the S1 Hold, from the NTN Bearing Tasks Menu, select the Sales folder, then Release Processes folder. Click Release Stock Holds. This will display the Release Stock Holds – Work With Held Orders screen.

EnterpriseOne Menu 🔮 🗖 🔲 Open Applications 🗟	Relea Select	ase S	tock H	olds <u>R</u> ow	- Wo	ork With	Held C	rders	
- <u>Work With Held Orders</u> Open New Window Favorites ✓ NTN Bearing Tasks ✓ NTN Bearing Tasks ✓ Address Book ◇ Non-Stock Purchases ◇ Inventory ✓ Sales ◇ Sales ◇ Sales ◇ Sales ◇ Release Processes ◇ Release Processes ◇ Release Backorders <u>On-Inne</u> Palease Stock Holden	Brar Hol Pers Cus Orde	d Code son Res tomer/s	X sponsib Supplier ber	le		× *	Q	*	s
	Nor	ecords Hd Cd	found. Ord Nun	er 1ber	Or Ty	Order Co	Chg Order	Line Number	Distribution L Number

a. Enter the sales order number and click Find.

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ect Find	Close Rov		s					
Branch/Plan	nt	1	k					
Hold Code		*						
Person Res	ponsible			Q				
Customer/S	supplier	*						
Customer/S Order Numb	supplier ber	*			*	*		
Customer/S Order Numb	supplier ber	*	*		*	×	4	
Customer/S Order Numb	supplier ber	*			*	8		
Customer/Si	ber	*	*		*	8		
Customer/S Order Numb	found.		*		*	*		
Customer/S Order Numb	found.	*		Che	* (*		

b. The screen should display results shown here.

elect	Find	Cjose	Row	Tools	5				
Bran	ich/Pla	nt		*	9X				
Hol	d Code	9		*					
Pers	on Re	sponsib	e	*					
Cus	tomer/	Supplier		*					
Orde	er Num	ber		1	780030		*	x	
Orde	er Num ords 1	-1		1	780030	/	*	*	\mathbf{X}
Orde	er Num ords 1	. 1		1	780030		*	•	
Orde	ords 1 Hd Cd	- 1 Orde Nurr	er	1 Or Ty	780030 Order Co	Chg Order	* Line tumber	* Distribution Line Number	Description

c. Check box on far left of order information line and click Select.

Select Find	Close Rov	100	ls				
1 0	X II	2					
Branch/Plan	1						
Hold Code		P					
Person Res	ponsible	F					
Customer/S	upplier	1					
Order Numb	er	1	1780030			*	
Order Numb	er	[1	1780030		¢.	*	
Records 1 -	er 1	1	1780030		*	•	
Records 1 -	1 Order Number	Or	Order	Chg	e Line Number	Distribution Line Number	Description
Records 1 -	1 Order Number 1780030	Or Ty SI	0rder Co	Chg Order 000	* Line Number	Distribution Line Number	Description

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d. The Release Stock Holds – Password Confirmation screen will appear. In the Password field, as shown below, enter S1. When this is entered, it will display as two black dots; that is normal. Click OK.

elease Stock Holds Daer K Cancel Iools	sword Confirmation		
Hold Code Order Number	S1 1780030	Sales Order Hold	
Dist. Line Number Amount	66.00		
Branch/Plant	NTN		
Password (

e. You are returned to The Release Stock Holds – Work with Held Order screen. This screen will initially look populated with the original data. The screen must be refreshed to update the changes. To refresh, click Find. If order information is removed the message No Records Found will be displayed and the S1 Hold has been successfully removed.

InchiPlant • • • • • • • • • • • • • • • • • • •	Branch/Pla Hold Code Person Re	nt	*			
r Number 1780030 * *	Customer/ Order Num	sponsible Supplier Iber	* * 1780030		• [•	
ords 1 - 1 <u>Cu</u>	No records	s found.				
Hd Order Or Order Chg Line Distribution Line Cd Number Ty Co Order Number Number Description	Hd Cd	Order Or Number Ty	Order Co	Chg Order	Line Number	Distribution Line
S1 1780030 SL 00001 000 Order Level Hold						
St 1780030 SL 00001 000 Order Level Hold		number ly	0	order	Number	NUMDer

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3. Even when the Release Stock Hold screen indicates there is no record, always check the Customer Service Inquiry screen to validate the change, see step 3d. In this example, the S1 no longer appears in the Hd Cd field. The S1 Hold is removed and the order will advance to the next status: print pick slip/shipment confirmation (540/560).

<u>d</u>		by Close	Eorm Row	Tools		
stomer Ser	rvice Inqu	iry Additior	al Selections			
Order Num	nber	1780030	*	*	Branch/Plant *	
Customer F	PO	*				
Item Numb	ber	8				
Sold To		×			Extend	
					Custor	
Ship To		Ľ				
Ship To		-				
Ship To cords 1 - 2	-	1			Customize Grid	
Ship To cords 1 - 2					Customize Grid	

VI. <u>RECORDS</u>: NA

VII. <u>RELATED DOCUMENTS</u>: CS-IAM-020 How to Enter a Sales Order in JD Edwards

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