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- I. **SUBJECT:** How to place and remove S1 Holds on Sales Orders in JD Edwards.
- II. **PURPOSE:** To prevent a sales order from advancing to pick status in JD Edward.
- III. **PERSONNEL AFFECTED:** All Customer Relations Advocates, Customer Relations Supervisors, and Customer Relations Manager.
- IV. **RESPONSIBILITIES:** 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. **INSTRUCTION:**

- 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.

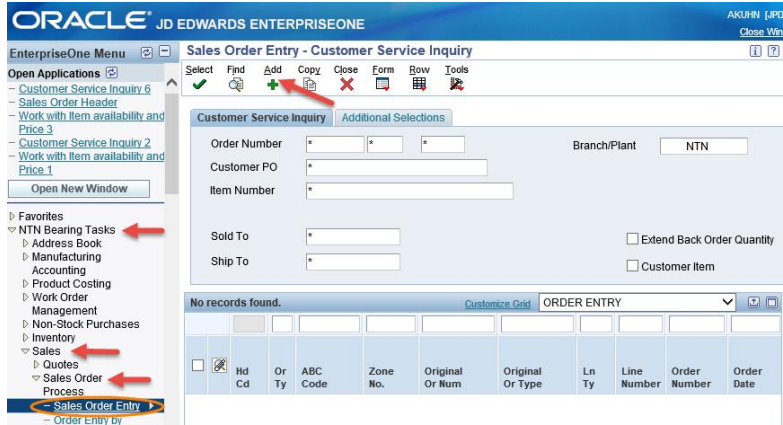
S1 Holds can be placed at the time a new order is entered or a subsequent time after the order has been completed.

- 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.

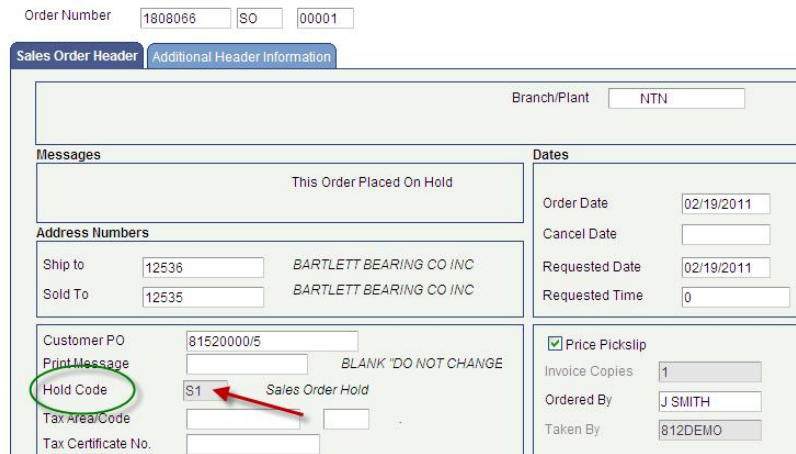
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- b. On the sales order header screen, note the Hold Code field, enter S1 in that field; click OK.
- c. Resume data entry for other header fields (see CS-IAM-020 for reference). When the order is complete, view the Hd Cd to see if S1 populated in the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

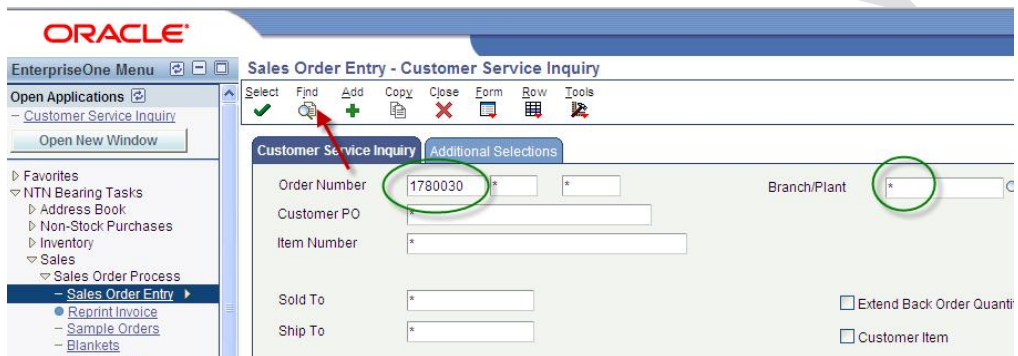


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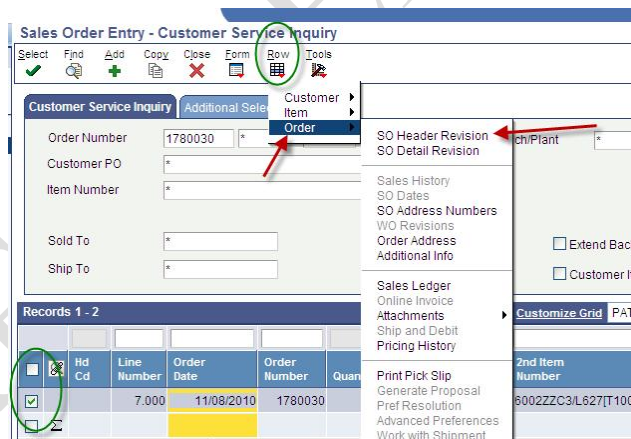
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- d. To place an existing order on S1 Hold, go to NTN Bearing Tasks menu, (or from your Favorites menu, if you have saved it there), Select Sales, Sales Order Entry folder. Enter sales order number and place an asterisk * in the Branch/Plant field.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



- 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.



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

Sales Order Entry - Sales Order Header

Order Number: 1780030 SL 00001

Branch/Plant: NTN

Messages

Address Numbers

Ship to: 12536 BARTLETT BEARING CO INC
Sold To: 12535 BARTLETT BEARING CO INC

Customer PO: 8153826/7
Print Message: BLANK 'DO NOT CHANGE'
Hold Code: Blank - Hold Codes 42/HC
Tax Area/Code:
Tax Certificate No.:

Dates

Order Date: 11/08/2010
Cancel Date:
Requested Date: 11/08/2010
Requested Time: 0

Price Pickslip

Invoice Copies: 1
Ordered By: GMC DONALD
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.

Warnings

Issues (click each label for more information):
Review Order Header Data Before Accept

Please look for the highlighted fields, correct the entries, and resubmit your request.

Order Number: 1780030 SL 00001

Messages

This Order Placed On Hold

Address Numbers

Ship to: 12536 BARTLETT BEARING CO INC
Sold To: 12535 BARTLETT BEARING CO INC

Customer PO: 8153826/7
Print Message: BLANK 'DO NOT CHANGE'
Hold Code: S1 Sales Order Hold
Tax Area/Code:

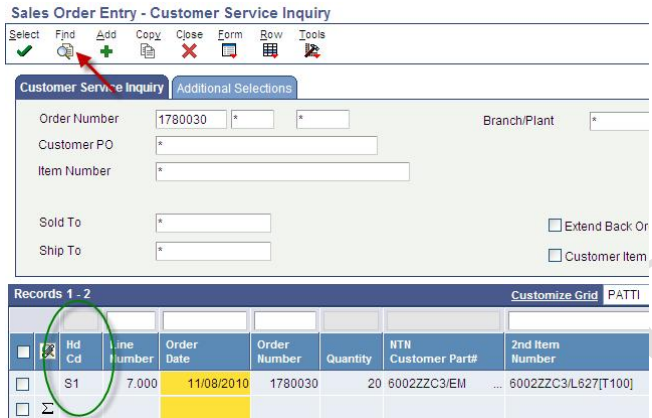
- h. You are

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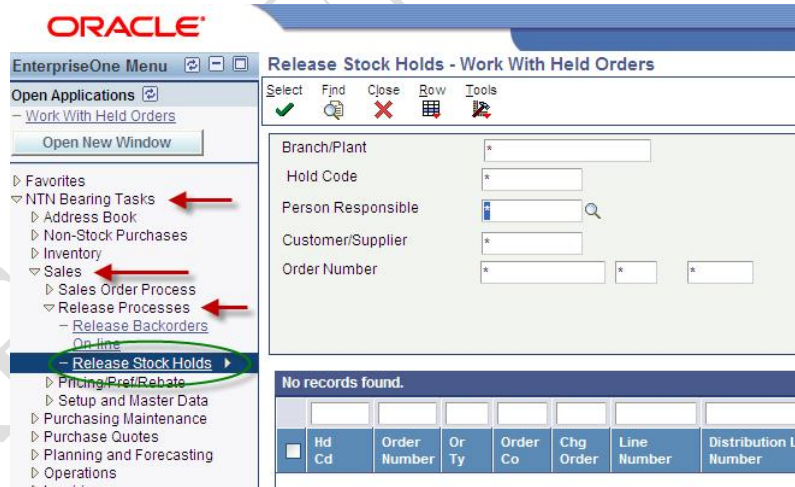
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returned to the Customer Service Inquiry screen. Click Find to refresh the data. Check to see if the Hd Cd field reflects S1. If yes, then order has been successfully placed on hold. In the example below, the order is now on hold.



- 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.



- Enter the sales order number and click Find.

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Release Stock Holds - Work With Held Orders

Select Find Close Row Tools

Branch/Plant *
 Hold Code *
 Person Responsible *
 Customer/Supplier *
 Order Number * * *

No records found.

Hd Cd	Order Number	Or Ty	Order Co	Chg Order	Line Number	Distribution Line Number	Description
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b. The screen should display results shown here.

Release Stock Holds - Work With Held Orders

Select Find Close Row Tools

Branch/Plant *
 Hold Code *
 Person Responsible *
 Customer/Supplier *
 Order Number 1780030 * *

Records 1 - 1

Hd Cd	Order Number	Or Ty	Order Co	Chg Order	Line Number	Distribution Line Number	Description
<input type="checkbox"/>	S1	1780030	SL	00001	000		Order Level Hold

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

Release Stock Holds - Work With Held Orders

Select Find Close Row Tools

Branch/Plant *
 Hold Code *
 Person Responsible *
 Customer/Supplier *
 Order Number 1780030 * *

Records 1 - 1

Hd Cd	Order Number	Or Ty	Order Co	Chg Order	Line Number	Distribution Line Number	Description
<input checked="" type="checkbox"/>	S1	1780030	SL	00001	000		Order Level Hold

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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.

- 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.

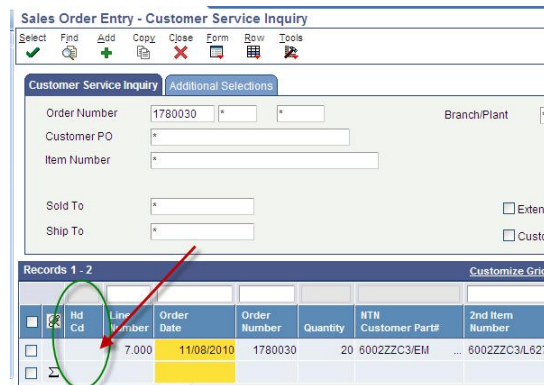
Hd Cd	Order Number	Or Ty	Order Co	Chg Order	Line Number	Distribution Line Number	Description
S1	1780030	SL	00001	000			Order Level Hold

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- 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).



VI. **RECORDS:** NA

VII. **RELATED DOCUMENTS:** CS-IAM-020_How to Enter a Sales Order in JD Edwards

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