Work Instruction: Using Job Holds

1. Audience
Engineering, Customer Service

2. Objective:
How to put a Sales Order/Job on hold and how to take it off hold.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	06/02/2018	Original issue.	Wagner
001	11/19/2019	"On Hold" date update to 11/11/2222	Wagner
002	5/19/23	"On Hold" date update to 11/11/2099 & Process Change	Rigotti

4. Scope
When a Sales Order is put on hold, the Sales Order/Job needs to be put on hold in M1. When the information required is received, it will need to be removed from hold and rescheduled.

5. Prerequisites
Knowledge on Operating M1

6. Records
Job and Sales Order Record (Electronic)

7. Associated Documents
N/A

8. Evaluative Factors
On Hold Jobs (KPI)

9. Responsibility
Engineering

10. Instructions

Putting an Engineering Sales Order/Job on Hold

A request will come from either Sales or Engineering to put an order on hold when all the information required to complete a job is not available or the customer has requested the order to be put on hold.

Step 1

Open the sales order that needs to be put on hold:

A. Click on "Sales Order Management" then click on "Sales Order Entry".

B. Type in the Sales order number to be put on hold. Click on Get Data on the right side of the screen.

C. Double click on the appropriate line to open the sales order.

Step 2

If Sales has not changed the "Req. Ship Date" to 11/11/2099 on the Sales order, change it to 11/11/2099 (Date used for anything on hold).
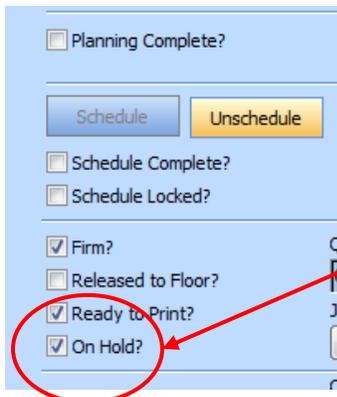
Step 3
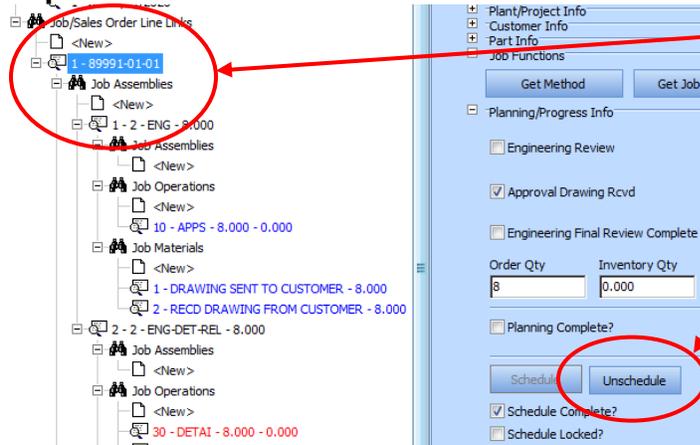
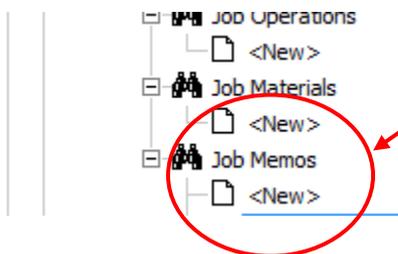Click on the job that needs to be put on hold.

Click on the "Unschedule" button on the right side of the screen. This will remove the schedule form any Engineering operation that are open.

Step 4

Check the "On Hold?" box to put the job on hold.

Step 5

Click on <New> under "Job Memos"

Step 6

In "Summary" type "On Hold".

In "Memo Text" type in reason that the job was put on hold.

Check the "Show in Jobs?" box.

Send an email to the Designer letting them know the job is on hold.

Taking an Engineering Sales Order/Job off Hold

When the information needed to complete the job is received, Sales will send an e-mail requesting Engineering to proceed with the job.

Step 7

Open the Sales order per Step 1 of this instruction, then continue to step 8.

Step 8

Send an email to the designer to let them know the Order is no long on hold.

If the order is in the detail/release process, continue to step 9. The new "Req. Ship Date" will be entered by Sales.

If new approval is required, determine new due date for approval. This new due date is determined by the Engineering Scheduler and/or the Sales person handling the order.

Put new date in "Req. Ship Date*" field.

Click on "Sales Order Line" that is to be updated.
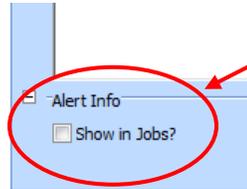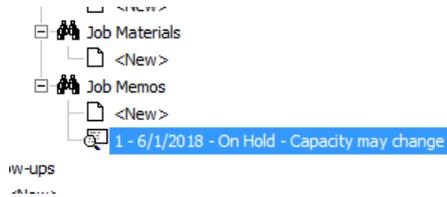
Enter the new date in "Approval Dwg. Due" on right side of screen.

Step 9

Click on the job that needs to be updated. Uncheck the "On Hold?" button on the right side of the screen.

Step 10

Uncheck the "Show in Jobs? Box so the pop-up no longer shows when the job is oened.

Step 11

If an approval drawing is required, continue with scheduling per WI-20-041-Assigning Designer and Setting Approval Date, Steps 4 using the new assigned date.

If no approval is required or the order was already in the detail/release stage, continue with scheduling per WI-20-011-Assigning Designer and Release Due Date, Step 4.