Softrader Documentation - Document_Hold_Rules_Feature_Announcement
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Document Hold Rules – Configurable Document Generation Controls

Softrader Cloud – New Feature

February 2026

What Is It?

Document Hold Rules is a flexible rules engine that lets you prevent specific documents from being generated unless defined conditions are met. Instead of relying on manual checks before producing invoices, acknowledgements, or delivery notes, you define rules once and the system enforces them automatically.

When a rule blocks a document, the user sees a clear message explaining what needs to be corrected before the document can be generated.

How It Works

Defining Rules

Administrators create rules in **Settings → Document Hold Rules**. Each rule specifies:

- **Which document to block** — e.g. Commercial Invoice, Acknowledgement, Delivery Note, Purchase Order, Pick List
- **Under what conditions** — a set of checks against order, line, customer, supplier, or product data
- **What message to show** — a clear explanation of why the document is blocked and what to do about it

Condition Builder

Rules are built using a visual condition builder that supports complex logic with nested AND/OR groups. You pick a data source, a field, an operator, and a value — no coding required.

Example: Intrastat Validation

> *Block Commercial Invoices when the customer's country is not UK **and** any order line is missing Weight, Commodity Code, or Country of Origin.*

Example: Contract Review Required

> *Block Acknowledgements when the job's Contract Review has not been completed.*

Example: Credit Check

> *Block Order Confirmations when the order total exceeds £10,000 and credit has not been approved.*

Supported Operators

Rules support a wide range of comparisons:

Operator	Use For
Equals / Not Equals	Exact value matching
Is Empty / Has Value	Checking whether a field has been filled in
Greater Than / Less Than	Numeric thresholds
Contains / Starts With	Partial text matching
In List / Not In List	Checking against multiple values

Data Sources

Rules can check fields from across the order, including:

- **Order header** — job category, VAT code, contract review status, dates
- **Order lines** — weight, commodity code, country of origin, supplier, costs
- **Customer / Delivery / Invoice-to address** — country, payment terms, category
- **Supplier** — payment terms, country, VAT code
- **Product data** — unit, category, stock code
- **Calculated values** — order total, line count, days since created

Lookup fields (such as Country or Payment Terms) are automatically resolved to their display values, so you write rules using names like "United Kingdom" rather than internal IDs.

Line-Level vs Header-Level

Each rule can be configured to apply at different levels:

- **All items must match** — every order line must satisfy the conditions
- **Any item matches** — the document is blocked if even one line triggers the rule
- **Header only** — only checks order-level fields, ignoring individual lines

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Hard Blocks vs Soft Blocks

Each rule is configured as either a **hard block** or a **soft block**, giving you control over how strictly the rule is enforced.

Hard Blocks

A hard block completely prevents the affected order line from being added to the document. The user sees a clear message listing the reasons, and must resolve the issues before the document can be generated. There is no way to override a hard block — the data must be corrected first.

Use hard blocks for compliance-critical checks, such as missing Intrastat data on export invoices.

Soft Blocks

A soft block warns the user that something may need attention, but allows them to proceed if they choose. The affected lines are flagged with the reason, and the user can decide whether to continue or go back and fix the issue first.

Use soft blocks for best-practice checks where judgement is needed, such as flagging unusually large quantities or missing optional fields.

Key Points

- **No impact on existing data** — the module uses its own configuration table and does not modify order or product data.
- **Priority ordering** — rules are evaluated in priority order, so you can control which checks run first.
- **Enable/disable per rule** — individual rules can be toggled on or off without deleting them.
- **Batch checking** — when generating documents covering multiple order lines, all lines are checked and all blocking reasons are reported together.
- **Feature toggle** — the module is enabled per tenant via a system variable, so it can be switched on when you're ready.

Getting Started

1. **Enable the feature** — ask your administrator to turn on Document Hold Rules in system settings.
2. **Create your first rule** — go to Settings → Document Hold Rules and click New Rule.
3. **Build conditions** — use the visual builder to define when the rule should block a document.
4. **Write a clear message** — tell users what they need to fix (e.g. "Fill in Intrastat fields before generating this invoice").
5. **Set priority and activate** — assign a priority number and enable the rule.
6. **Test it** — use the built-in test function to check a rule against an existing order before going live.

Common Use Cases

Scenario	Document Blocked	Condition
Missing Intrastat data on exports	Commercial Invoice	Customer country is not UK and weight/commodity/origin fields are empty
Contract Review not completed	Acknowledgement	Header contract review flag is not set
Large orders without credit approval	Order Confirmation	Order total exceeds threshold and credit not approved
Missing supplier details	Purchase Order	Supplier payment terms or country not set
Incomplete hazmat documentation	Delivery Note	Product category is hazardous and safety data fields are empty

For further details, contact your Softrader representative.