Close Open Document

Module Guide: Close Open Document

Module Location

Settings > Document Settings > Close Open Document

Module Purpose

The **Close Open Document** module serves as an administrative tool to manually change the status of documents, specifically to "close" documents that are still considered open by the system or to "reopen" documents that have already been closed. This function is crucial for managing documents that will not be processed further (e.g., a Purchase Order that was only partially fulfilled) or for correcting status errors.

1. Main View (Document List)

The main page displays a list of documents based on the selected type. From here, users can change the status of selected documents in bulk.

View Explanation

- **Document Filter**:
  - **Document Type**: A dropdown menu to select the type of document to manage (e.g., Purchase Order).
  - **Search Filter**: A search field to find specific documents based on certain criteria.

    - **Date Filter**: Allows filtering of documents by a date range (from **Start Date** to **End Date**).

- **Document Table**:

    - **Checkbox**: To select one or more documents whose status will be changed.

    - **[Document Type] Number**: The unique number of the document (e.g., Purchase Order Number).

    - **Supplier/Customer**: The third party associated with the document.

    - **PO/Document Date**: The creation date of the document.

    - **OpenStatus**: The open status of the document. A checkmark (?) indicates the document is still "Open."

- **Action Buttons**:

    - **Close Open Document**: The main button to change the status of selected documents (from open to closed, or vice versa).

    - **Archive**: A button to archive the selected documents, possibly moving them from the active list.

2. Steps to Close or Open a Document

Step 1: Select Type and Filter Documents

Select the desired **Document Type** from the dropdown. Use the date filter or search if needed to find the relevant documents, then click **Search**.

Step 2: Select Documents

Check the box on the left for one or more document rows whose status you want to change.

Step 3: Execute the Action

Click the **Close Open Document** button to change the open status of the selected documents. A document that previously had a checkmark in the **OpenStatus** column will lose the mark (becoming closed), and vice versa. Use the **Archive** button if you wish to archive the document.

Integrated Workflow & Business Process

- Closing a document, such as a **Purchase Order**, will prevent any further transactions related to it. For example, the warehouse department will no longer be able to create a goods receipt document (Receipt Report) that references a closed PO.

- This function is very useful for "cleaning up" pending transaction data. For instance, if a PO was only 90% delivered by a supplier and the remaining 10% will never be sent, the PO can be manually closed so it no longer appears in open order reports.

- Reopening a document allows related transactions to be resumed.

Tips & Important Notes

- The action of closing or opening a document is a manual **override** of the system's standard workflow. Use this feature with caution.
- Ensure you have the proper authorization and a clear understanding of the impact of changing a document's status before doing so.
- This feature is typically granted only to users with high-level access rights, such as department managers or system administrators, for control and data correction purposes.

Revision #1
Created 22 October 2025 09:13:38 by Muhammad Ali Akbar
Updated 22 October 2025 09:16:02 by Muhammad Ali Akbar