Pending Document Settings

Module Guide: Pending Document Settings

Module Location

Settings > System Settings > Pending Document Settings

Module Purpose

The **Pending Document Settings** module serves as a control panel for administrators to select which types of operational documents with a pending status will be displayed as notifications or alerts within the system, most likely on a user's main dashboard. Its purpose is to highlight documents that are stalled or require follow-up, so that business processes can run smoothly.

View and Configuration Explanation

This page contains a list of various types of transactional documents from the sales, purchasing, and inventory cycles.

Document Options List

Each row represents a document type for which the process has not yet been completed. Next to each document name is a checkbox.

- If checked, notifications or summaries for pending documents of this type will be active and displayed to the relevant users.
- If unchecked, notifications for this document type will be hidden.

Available Document Types:

- **Outstanding Warehouse Transfer Requisition**: Warehouse transfer requests that have not been processed.
- **Outstanding Warehouse Transfer (Warehouse Transfer Acceptance)**: Warehouse transfers where goods have been shipped but not yet received by the destination warehouse.
- **Outstanding Warehouse Transfer (Internal Shipment Notes)**: Warehouse transfers for which an internal shipment note has not yet been created or processed.
- **Outstanding Sales Order**: Customer sales orders for which goods have not yet been shipped.
- **Outstanding Delivery Instruction**: An instruction to ship goods for which a Delivery Order has not yet been created.
- **Outstanding Delivery Order**: A Delivery Order that has been created but has not been confirmed as received by the customer or has not yet been invoiced.
- **Active Purchase Requisitions Not Yet Completed**: Internal purchase requisitions that have not yet been converted into a Purchase Order.
- **Outstanding Purchase Order**: Purchase orders sent to suppliers for which the goods have not yet been received.
- **Outstanding Goods Receipt**: Goods that have been received from suppliers but have not yet been matched with a purchase invoice.

Action Buttons

- **Save**: Saves the configuration for which pending document notifications will be displayed.

Workflow and Integrated Business Process

- **Workflow Visibility**: By enabling these options, managers and operational staff gain direct visibility on their dashboards regarding "bottlenecks" in the workflow. For example, the sales team can see how many orders are still pending, and the warehouse team can see how many goods they need to receive.

- **Increased Accountability**: Highlighting pending documents encourages the responsible personnel to take immediate action. This helps to reduce the cycle time from order to delivery and from requisition to receipt.

- **Basis for Decision-Making**: This information provides quick data for managers to make decisions. If the number of "Outstanding Purchase Orders" is very high, it may be time to check in with suppliers.

Tips and Important Notes

- **Select According to Need**: Activate notifications only for the most crucial documents to monitor. Activating all of them could clutter the dashboard and cause important information to be overlooked.

- **Role Relevance**: Ideally, the system can be further configured so that each type of pending document notification

appears only for relevant users. For example, "Outstanding Purchase Order" notifications are more relevant to the purchasing team than to the sales team.

- **Initial Configuration**: These settings are usually part of the initial system setup tailored to the company's core business processes. It is important to conduct regular reviews to ensure the settings remain appropriate as business needs evolve.

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