

# Setting Up Document Statuses

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## Overview

Document Status helps you control the movement of transactions through your work flow and they are available on all Transactions. The system comes *prepackaged* with a set of Statuses for each document Type, however, you can *add and assign new ones* as needed. These prepackaged Statuses will *auto apply* to your documents based on certain rules.

## Adding a Document Status

For instance, on a Sales Order, a Status can be created that states an Item requires a payment. This would cause the document to change the Status to Payment Pending. Once the Payment is received, and all lines of the Sales Order are Shipped, the document will auto set itself to Closed.

The screenshot displays the OrderTime interface for a Sales Order. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main content area shows the Sales Order details, including General information (No. 1, Customer: Match Point Tennis, Date: 7/19/2023), Bill Address (MATCH POINT TENNIS, 20 GRAND SLAM AVENUE, SUITE 40, FORT LAUDERDALE, FLORIDA 33334, UNITED STATES), and Ship Address (MATCH POINT TENNIS, 20 GRAND SLAM AVENUE, SUITE 40, FORT LAUDERDALE, FLORIDA 33334, UNITED STATES). A dropdown menu for 'Status' is open, showing options: Processing, On Credit Hold, Approved, Voided, and Closed. The 'Payment Pending' status is highlighted with a red box and a red arrow pointing to it. Below the order details is a table of items with columns for Line No., Item, Description, Quantity, Filled, UOM, Price, Ext., Tax Code, Cleared, and Actions.

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	TAX CODE	CLEARED	ACTIONS
1	HPB984-12	Head PowerBlazt 98" (4-1/2)	12.00	12.00	EA	200.00	2,400.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Head Racquet Cover	Head Racquet Cover 98"	12.00	12.00	EA	0.00	0.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Pre-Strung Service	String service for racquets requested to be pre-strung prior to shipment	12.00	12.00	HR	0.00	0.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Head Twister 16g Poly Set	Head Twister 16g Poly Set	12.00	0.00	EA	30.00	360.00	Non	<input type="checkbox"/>	<input type="checkbox"/>

To edit your Document Statuses go to Admin and select Doc Status within the General section towards the left hand side of the screen.

The screenshot shows the Admin page in OrderTime. The left sidebar contains a tree view with sections: General, Settings, and Users & Roles. Under the General section, 'Doc Status' is highlighted with a red arrow. Other options in the General section include Import, Profile Lists, Alerts, ECommerce Integration, Shipping Integration, Accounting Integration, Label Printing, EDI Integration, REST Api, B2B Customer Portals, Other Integrations, and Create Support Login. The Settings section includes Company Info, Company Preferences, Custom Fields, Page Layouts, Email Templates, Form Templates, and Domain Verification. The Users & Roles section includes Roles, Users, and Billing and Subscription.

Select the Document you want to update from the list beneath Document Status on the left side

of your screen. After selecting the Document to update, you can create a new Status by clicking in the empty field at the bottom of the Name column.

The screenshot shows the 'Document Status' page in a software application. The top navigation bar includes 'Home', 'Sales', 'Purchasing', 'Production', 'Warehouse', and 'Reports'. Below the navigation, the breadcrumb 'Admin > Doc Status' is visible. The main content area is titled 'Document Status' and features a sidebar on the left with a list of document types: Sales Order, Quote, Ship Doc, Customer Return, Purchase Order, Receiver, Vendor Return, Work Order, Disassembly, Transfer, Adjustment, Count, Value Adjustment, Repair Order, and Rental Contract. The central part of the page contains a table with the following columns: Name, Type, Active, and Actions. The table lists several existing statuses: Processing, On Credit Hold, Payment Pending, Approved, Voided, and Closed. At the bottom of the 'Name' column, there is an empty input field, which is highlighted by a red arrow pointing upwards.

Input into the field the Name of the new Status and then click the field to the right under the Type column. This will provide a drop down window presenting the Type of Status you are creating.

This screenshot shows the same 'Document Status' page as the previous one, but with the 'Name' field now containing the text 'Waiting'. The 'Type' column for this row has a dropdown menu open, showing three options: 'Processing', 'Approved', and 'Voided'. A red arrow points to the dropdown menu. The 'Active' column for this row is set to 'true', and there is a red 'x' icon in the 'Actions' column. The rest of the page, including the navigation bar and sidebar, remains the same.

Once the Type has been selected you can click on the field in the bottom right hand corner under the Actions column. This will update the Status you created and place it in the Type column beneath the similar existing Types.

OrderTime

Search

Home Sales Purchasing Production Warehouse Reports

Admin > Doc Status

Document Status

Sales Order

- Quote
- Ship Doc
- Customer Return
- Purchase Order
- Receiver
- Vendor Return
- Work Order
- Disassembly
- Transfer
- Adjustment
- Count
- Value Adjustment
- Repair Order
- Rental Contract

Name	Type	Active	Actions
Processing	Processing	true	
Waiting	Processing	true	✘
On Credit Hold	Credit Hold	true	
Payment Pending	Payment Pending / Not Ap...	true	
Approved	Approved	true	
Voided	Voided or Not Processed	true	
Closed	Closed	true	

If you create multiple Types of Statuses you can arrange the Statuses within the Type to suit business needs such as alphabetical or process direction. To do this, select the Status within the specific Type you choose to move and click on the 3 horizontal lines for the Status. Drag the Status to the position within the Type that you choose. You can update by clicking in the empty box in the bottom right hand corner in the Actions column. In the example below, you can see that "Waiting" was moved above "Processing" in comparison to the prior screen presented.

OrderTime

Search

Home Sales Purchasing Production Warehouse Reports

Admin > Doc Status

Document Status

Sales Order

- Quote
- Ship Doc
- Customer Return
- Purchase Order
- Receiver
- Vendor Return
- Work Order
- Disassembly
- Transfer
- Adjustment
- Count
- Value Adjustment
- Repair Order
- Rental Contract

Name	Type	Active	Actions
Waiting	Processing	true	✘
Processing	Processing	true	
On Credit Hold	Credit Hold	true	
Payment Pending	Payment Pending / Not Ap...	true	
Approved	Approved	true	
Voided	Voided or Not Processed	true	
Closed	Closed	true	



Certain status types cannot be replicated because they are used by the system. For example, the Closed status of a Sales Order is a system status; there can only be one and therefore, cannot be replicated.

Clicking the red X in the Actions column will Delete the manually created Status. Users cannot Delete System required Statuses. Users can only Delete the Statuses they created.

	Name	Type	Active	Actions
≡	Processing	Processing	true	
≡	On Credit Hold	Credit Hold	true	
≡	Payment Pending	Payment Pending / Not Ap...	true	
≡	Approved	Approved	true	
≡	Voided	Voided or Not Processed	true	
≡	Closed	Closed	true	
≡				

Once satisfied with changes or updates, select **Save** in the upper right hand corner of the screen.

	Name	Type	Active	Actions
≡	Processing	Processing	true	
≡	On Credit Hold	Credit Hold	true	
≡	Payment Pending	Payment Pending / Not Ap...	true	
≡	Approved	Approved	true	
≡	Voided	Voided or Not Processed	true	
≡	Closed	Closed	true	
≡				

## Restricting Doc Statuses by Role

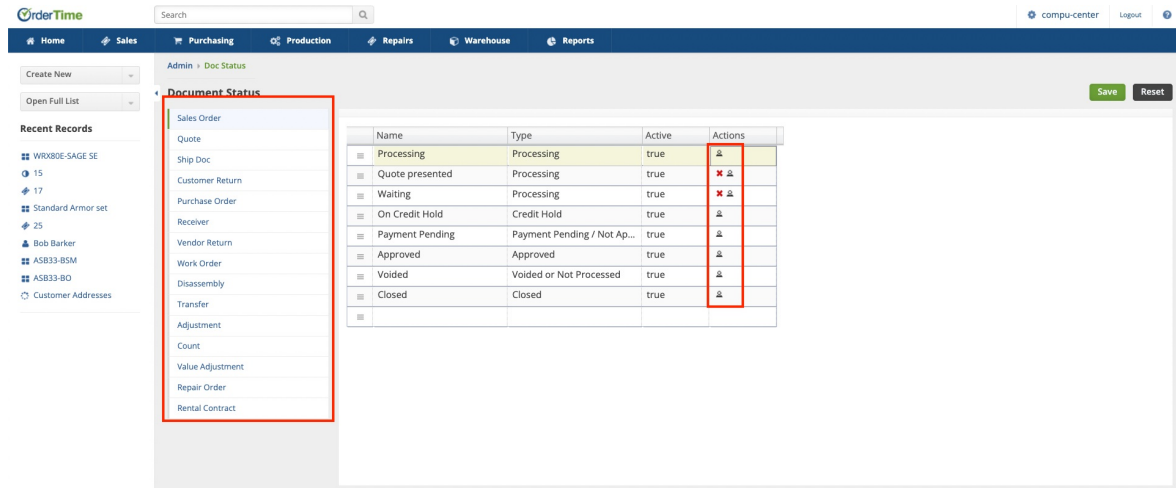


Please note that, for the time being, this feature is a hidden preference and must be enabled on

the backend by an Order Time staff member.

If you are looking to restrict entire sections of the system on a role-by-role basis, please refer to "[Setting Up User Roles](#)"

If you aim to further refine the restrictions to specific statuses based on roles, you can do so. You can do this by navigating to the doc status menu in the admin, then select a document and then clicking this small icon next to the status you would like to add the restriction to.



After reaching that point, the "Manage Status Change Restrictions" window should appear. Utilize the dropdown menu to select the role and status that you wish to revoke access from, and then click the "Add" button. Don't forget to click "Save" in the top right corner once you have made all the desired changes.

