

# Closing Open Orders

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## Overview:

There may be occasions where a Sales Order or Purchase Order has not and will not be fully fulfilled for any number of reasons. In those cases it is best to close the Sales/Purchase Order but keep the original ordered quantities on the Sales Order for future reporting.

To do this the Sales Order or Purchase Order may have its status set to Voided, which will clear the remaining open line items and then change the status to Closed automatically. To shorten this process there is a button to Close linked Sales Orders on the Ship Doc or Receiver.

## Solution:

On a Ship Doc there is a link back to the originating Sales Order. Right next to it is an icon that will close the linked Sales Order by automatically clearing the open line items.

The screenshot shows a web interface for a 'Ship Doc - 1348'. The breadcrumb trail is 'Sales > Ship Docs > Ship Doc'. The main header includes 'Ship Doc - 1348' with buttons for 'EDIT', 'EDIT CUSTOM FIELDS', 'Create PDF', and 'Exp'. Below this is a 'General' tab with fields for 'No. 1348', 'Customer Kirby Smart Change', 'Date 12/14/2023', 'Customer PO', 'Contact', 'SO No. 519' (with a red-bordered 'CLOSE' button), 'Ttl Pckg Weight', 'Posting Date', and 'discount date for invoice 12/18/2023'. A 'Bill' tab is partially visible on the right. At the bottom, there are tabs for 'Items', 'Details', 'Memo & Instructions', and 'Attachments', along with a search bar for 'Name/Number' and a 'Search Item' button.