

Edit Custom Fields on Closed Documents

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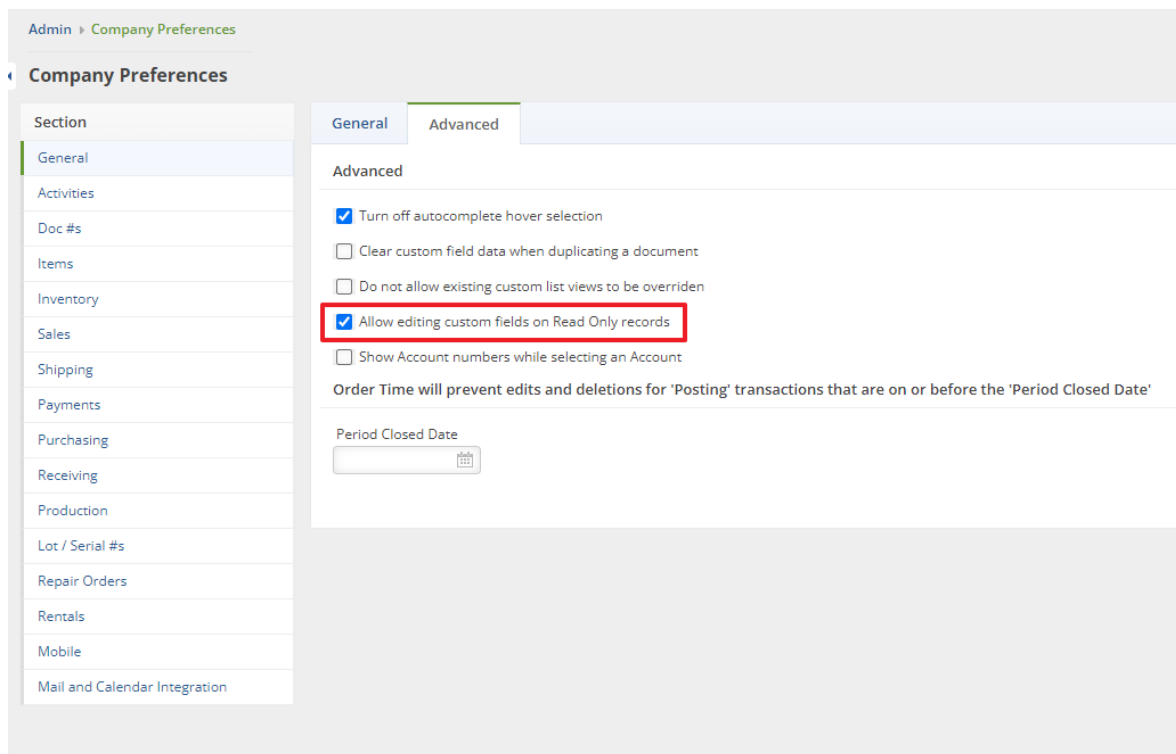
Overview:

There is now the ability to edit custom fields without have to re-open closed documents.

Solution:

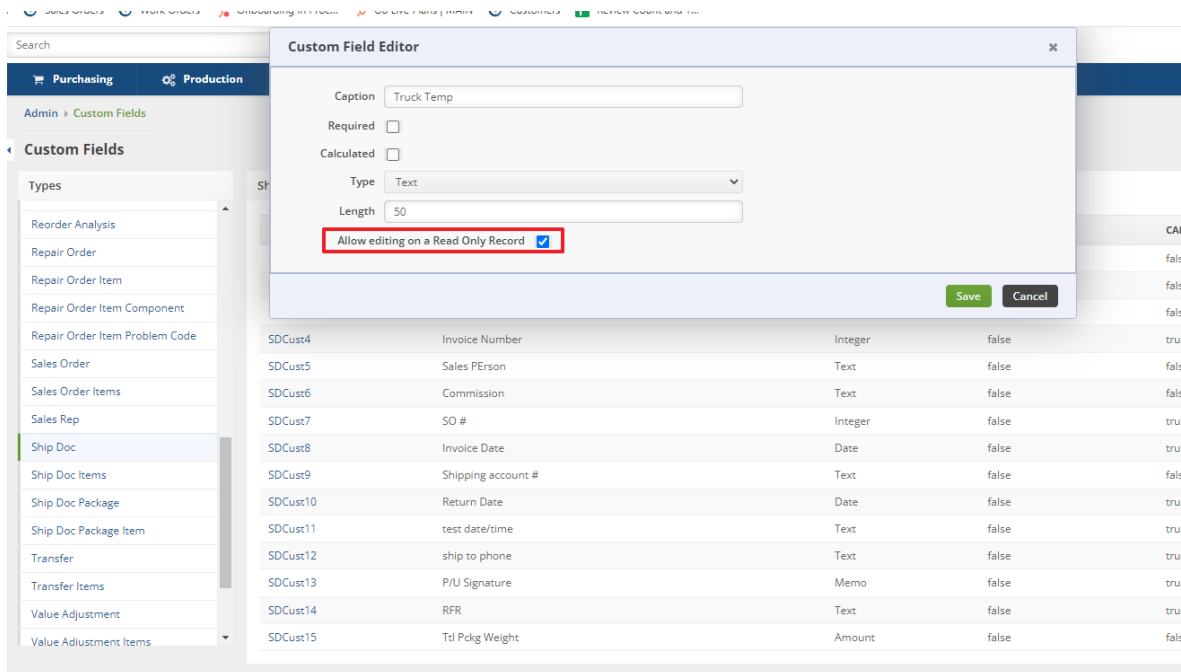
The Solution is two parts. First the preference has to be activated then the individual custom fields have to have the option selected.

Step 1: In the Company preferences under the General section click on the Advanced tab. Here there will be a new option to "Allow editing custom fields on Read Only records". Check that box.



The screenshot displays the 'Company Preferences' interface. On the left, a sidebar lists various sections: General, Activities, Doc #s, Items, Inventory, Sales, Shipping, Payments, Purchasing, Receiving, Production, Lot / Serial #s, Repair Orders, Rentals, Mobile, and Mail and Calendar Integration. The 'General' section is selected. The main content area shows two tabs: 'General' and 'Advanced'. The 'Advanced' tab is active, displaying several options with checkboxes. The option 'Allow editing custom fields on Read Only records' is checked and highlighted with a red box. Other options include 'Turn off autocomplete hover selection' (checked), 'Clear custom field data when duplicating a document' (unchecked), 'Do not allow existing custom list views to be overridden' (unchecked), and 'Show Account numbers while selecting an Account' (unchecked). Below these options, there is a note: 'Order Time will prevent edits and deletions for 'Posting' transactions that are on or before the 'Period Closed Date''. At the bottom, there is a 'Period Closed Date' field with a calendar icon.

Step 2: Find the Custom fields that should be allowed to be edited after a document has been closed. Then Edit that custom field and check the box for "Allow Editing on a Read Only Record".



Once both steps are complete there will be a new button on closed document to edit custom fields. Click that and it will launch a pop up allowing you to edit each field.



In this case I only had one custom field marked to be allowed to be edited on Closed Ship Docs.

Ship Doc - 1273

[RETURN](#) [RETURN SELECT](#) [EDIT CUSTOM FIELDS](#) [Create PDF](#) [Export](#) [Print Label](#) [Signature](#)

General

No. 1273
Customer Andrew Hicks [Change](#)
Date 5/23/2023
Customer PO
Contact
SO No. 434
Ttl Pckg Weight
Posting Date

Bill Address [map](#)

ANDREW HICKS
123 APPLE RD
CLERMONT, FL 33401

Ship Address [map](#)

ANDREW HICKS
TEST UPDATE
CLERMONT, FL 34235

Items **Details** Memo & Instruct



LINE NO.	ITEM
1	Partition

Edit Custom Fields ✕

Truck Temp

[Save](#) [Cancel](#)