Prerequisites:

1. **Short Close Setup**: To activate Document Short Close functionality, you must first setup the **Short Close Setup**.

   - Click on Document Short Close.

   - Document Short Close allows Short Close of Sales and Purchase documents. In this scenario we would be Short Closing Purchase Document.
2. **Short Close Line wise:** User can Short Close individual line instead of short closing whole document if he/she wishes other Item lines to processed for further transactions.

- Select the Item line which you want to Short Close and Click on Functions Tab on Purchase Order Subform.

In the below screenshot you can see that a negative entry gets created below the line which was Short Closed. In our case Item “1976-W” had 2 quantities as outstanding out of 4 quantities as already the rest 2 quantities were already Received. Upon short closing it, a negative Line gets generated for the same Item having 2 quantities.
3. **Remove Short Close Line wise:** User can Short Close individual line instead of short closing whole document if he/she wishes other Item lines to be processed for further transactions.

- Select the Short Closed line and Click on Functions Tab on Purchase Order Subform.

- As shown in the below screenshot, the negative line generated during the Short Close action gets removed and the Short Closed Item can be used for further transactions.
4. **Document Short Close**: User can Short Close the whole Order instead of short closing individual Item Lines.

- On Card Page go to Functions Tab in Actions.

- As the document gets Short Closed, it gets moved to Short Closed Purchase Order List.
5. **View Short Closed Document**: Once a document is Short Closed, it moves to Short Closed Document List which separated Short Closed Orders from Operational Orders.

- Click on Document Short Close Tab.
- **Short Closed Document List**
• **Short Closed Document Card**: In the below screenshot, all the Item lines having outstanding quantities have a corresponding negative line generated for them.
6. **Reopen Short Closed Documents**: User can Reopen the Short Closed Document. Once done it moves back to Purchase Order List.

- On Card Page go to Functions Tab in Actions.

- Once done the document moves back to Purchase Order List.
7. **Sales Short Close**: The Sales Short Close functionality operates in a similar way compared to Purchase Short Close once appropriate setup done in

- **Short Close Setup.**

- **Short Close Current Line/ Remove Short Close from Current Line.**
- **Document Short Close / Reopen Short Closed Documents**

- **Short Closed Document List**
• Short Closed Document Card