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3 Easy Ways to Close Transactions in NetSuite

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To close transactions in NetSuite is a task that is performed on a regular basis. Closing transactions is a situation that could occur when, for example, a Sales Order has been created and the Customer decides that they do not want a specific item on that Sales Order. It could also happen in the case of a purchase transaction, in a similar fashion, where you have decided to forgo ordering a specific line on the Purchase Order and so close the line item. In both cases, all the other lines remain open.

In another use case, you may need to close the whole transaction instead of deleting it. Perhaps a Sales Order or Purchase Order that has been canceled, for

example.

So, what are my options? How can I close my transactions in the most effective way possible?

Close Transactions in NetSuite

Line by line

You have the possibility of editing and removing that line item or you can retain the traceability and close that line in particular. To be able to close a line on a transaction, you must navigate to the transaction, edit it, and scroll down to the line items. There, you will find a transaction column field entitled “Closed”.

Caution: this field may not be exposed on your form. If you do not see the “Closed” transaction column field, you may have to customize the form to expose the field.

Closing the whole order

Instead of closing line by line, you may want to close the whole order all at once. In this case, you would navigate to the top or bottom of the order and locate the “Close Order” button on the transaction.

CSV import

You can also mass close orders or even line items on orders via CSV. First, create a saved search of all your line items (or orders) you would like to close. **You will need the line ID and the transaction internal ID to map them correctly.** Once that is done, modify your csv and update your transactions mapping the correct fields.

And there you have it, 3 ways to close your orders in NetSuite! Have anymore ways? Let us know!