

How Do You Restrict Users from Editing a Closed Quote, Order, or Invoice?

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Quotes, Orders, and Invoices offer options within Role Manage which allow restricting users from editing closed records. Separate options can be unchecked to restrict ability to Edit Closed Invoice, Edit Closed Order and Edit Closed Quote.

If the user is restricted from editing a closed record, they will still be able to edit or close an open record. However, once it is closed, they will no longer be able to Save/Process any edits to that record or delete that record.

If the user is already restricted from editing an invoice, they will already be restricted from editing a closed invoice.