Overview of Record Status Levels

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Typically, the system will automatically activate a record after you enter the required data. If it does not activate the record, it usually means validations have identified missing information.

Event-Driven Status Levels

Transaction records (e.g. orders, invoices, etc) usually have an event-driven life cycle. They typically use the following status levels:

- **Pending** — The record is in the process of being created. It is not yet considered "real."
- **Open** — The record is "real," current, and awaiting some event before being closed.
- **Closed** — The closing event has occurred and the record is no longer current.

For example, an invoice is Pending while data is being entered. It is set to Open once data has been properly input and it carries a balance due. It is usually changed to Closed automatically when the invoice has been paid or is otherwise at a zero balance.

General Status Levels

Master data records that do *not* have an event-driven life cycle (e.g. companies, line item codes, etc) typically use the following status levels:

- **Pending** — The record is in the process of being created. It is not yet considered "real."
- **Active** — The record is "real" and current.
- **Inactive** — The record is no longer current.

For example, a company record is Pending while data is being entered. It is set to Active once data has been properly input and it is ready to be used. You can manually deactivate a record when the company is no longer considered valid by selecting that option from the Actions drop-down menu.

Status Indicators

Most list view screens include colored circles to highlight items that need attention, based on relevant dates:

- Red = open & overdue (e.g. Required By date is past)

- Orange = open & currently due (e.g. Required By date is today)
- Green = open (e.g. Required By date is in the future)
- Yellow = pending
- White = closed
- Black = voided