Learn with us.
Grow with us.
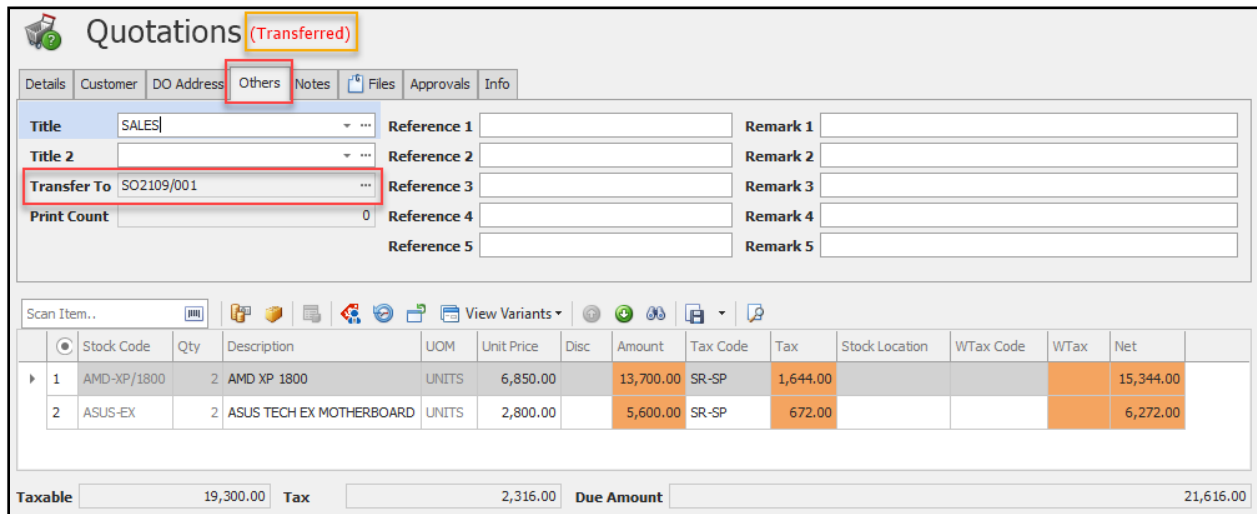QNE SOFTWARE

QNE KNOWLEDGE BASE

How to Undo the Transfer of a Particular Document

Once a document (e.g. Quotation) has already been transferred, to undo the transfer, you will have to cancel the document where it has been transferred to (e.g. Sales Order).
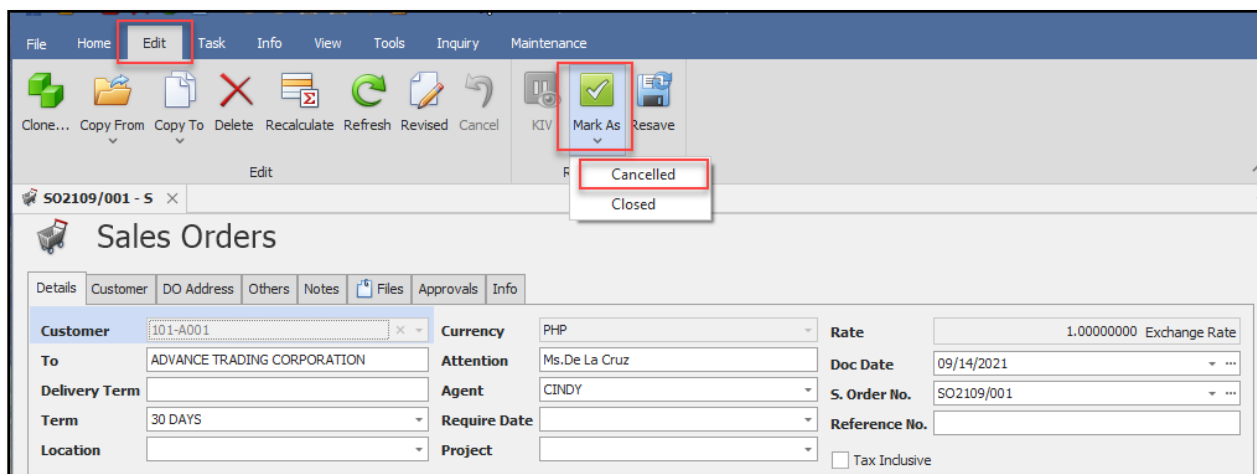
The sample Quotation below has already been fully transferred. To quickly identify where it was transferred to, click on the **Others** tab and the Document# is shown in the **Transfer To** field.

Go find and open that Document#. Go to **Edit** Ribbon tab > **Mark As** and click on *Cancelled*.

The document will have a tag (Cancelled) and some fonts will go red. Go to the **Home** Ribbon tab and save the document.

Go back to the source document (the Quotation) and click the **Refresh** button. The Transferred tag will be removed and the document is now allowed to be transferred to another document.

For further concerns regarding this matter, please contact support to assist you or create ticket thru this link https://support.qne.com.ph