

Close Contracts and Projects User Guide

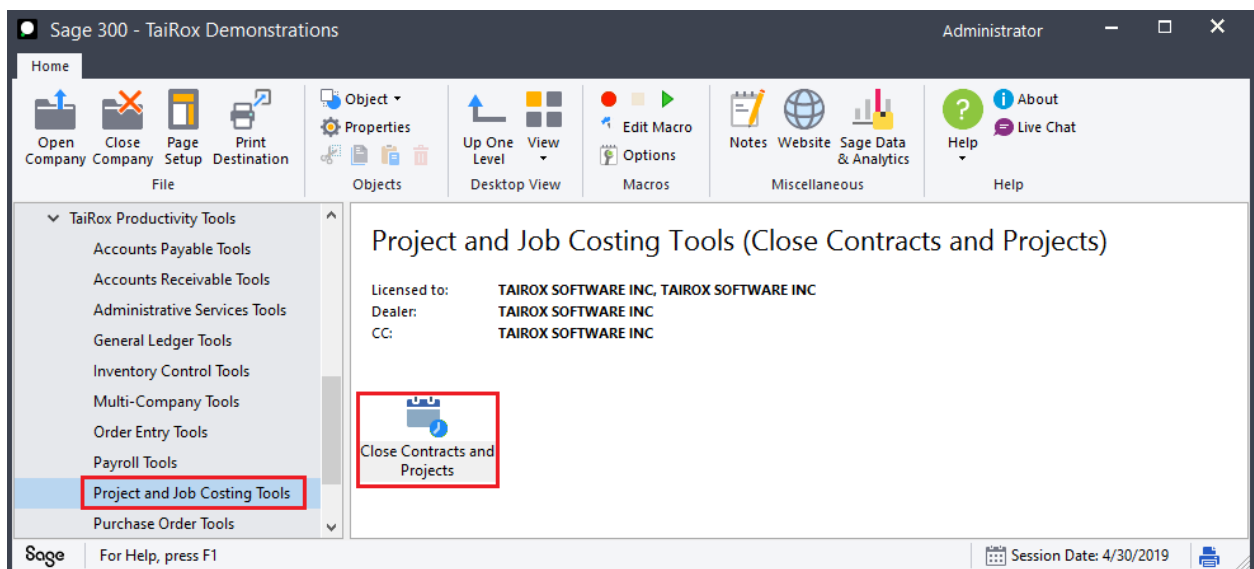
Businesses frequently have open contracts and projects that are suspended for a temporary period. The suspended contracts or projects are then cancelled sometime later, leaving open details that need to be closed.

Close Contracts and Projects lets you:

- Select contracts based on fields such as Contract, Structure Code, Customer Number, Contract Status, and Contract Optional Fields.
- See the list of selected contracts, showing all open projects.
- Process some or all of the selected contracts and project for processing.
- View a log. For contracts or projects that cannot be closed, the Sage 300 error message will be in the log. For example, a project cannot be closed until revenue recognition is run.

Running Close Contracts and Projects

The Close Contracts and Projects icon appears under **TaiRox Productivity Tools > Project and Job Costing Tools** on the Sage 300 desktop and can be copied to other menu locations.



Note that Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.

The Close Contracts and Projects screen (below) lets you find items to close by specifying a variety of selection criteria, such as the contract, structure code, customer number, etc. Contracts and associated projects are displayed.

Include	Contract	Project	Description	Status	☐ Customer	Customer Name	Structure Code
No	120-1200-10		Set up office for Ronald Black	Open	1200	Mr. Ronald Black	SECPRJ
No	120-1200-10	1001	Design office	Open			
No	120-1200-10	1002	Install white melamine board	Open			
No	120-1200-10	1003	Custom wall unit/book shelf	Open			
No	120-1200-10	1004	Stock office supplies	Estimate			
No	120-1200-10	1005	Set up credenza in boardroom	Estimate			
No	120-1200-10	1006	Place filing cabinets	Open			
No	120-1200-10	1007	Install desk light	Estimate			
No	120-1200-10	1008	Chair placement	Estimate			
No	120-1200-10	1009	Set up single pedestal in cubicles	Open			
No	120-1200-10	1010	Set up phones	Open			
No	120-1200-10	1011	Hang pictures on wall	Open			
No	120-1200-10	1012	Re-model wall panels	Open			
No	120-1200-10	1013	Quality control	Estimate			
No	120-1400-10		Set up office for Coastal Electric Company	Open	1400	Coastal Electric Company	SECPRJ
No	120-1400-10	1001	Design office	Open			

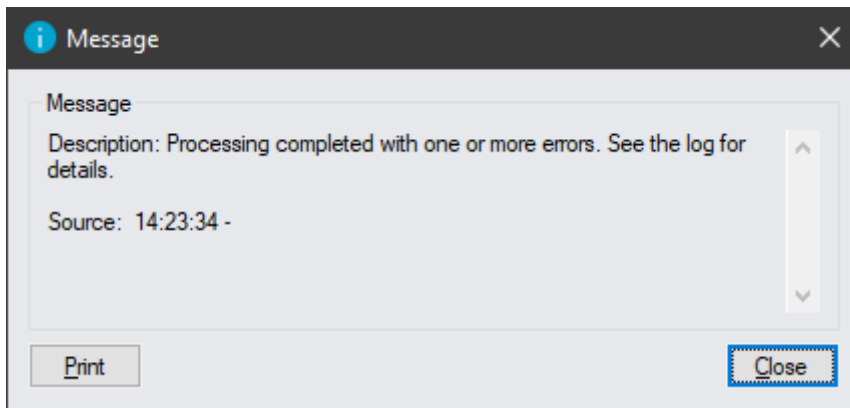
Choosing Documents from the Grid for Processing

- Use the Select All and Select None buttons.
- Double-click in the Include column to “cherry-pick” the items. Including the Contract will automatically include all projects for that contract (to close a contract, all of its projects must be closed).

Click the Process button to close the items:

The program asks you to confirm your choices. Click Yes to continue:

When processing is completed, a message will appear indicating errors, if any.



Click the Log button to confirm which items were closed and which items could not be closed.

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8/11/2026 2:23:34 PM =====
8/11/2026 2:30:21 PM Close Contracts and Projects started.
8/11/2026 2:30:21 PM Build 9719 created on 2026/08/11
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM Performed by user: ADMIN
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM Select Contracts and Projects To Close
8/11/2026 2:30:21 PM     Contract From [120-1200-10] To [220-1400-10]
8/11/2026 2:30:21 PM     Structure Code From [] To [ZZZZZZ]
8/11/2026 2:30:21 PM     Customer Number From [1200] To [1400]
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM Closing Contract 220-1400-10...
8/11/2026 2:30:21 PM     Closing Project 1001...
8/11/2026 2:30:21 PM         Only Revenue Recognition can set a Project to closed.
8/11/2026 2:30:21 PM         Cannot close Project 1001.
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM     Closing Project 1003...
8/11/2026 2:30:21 PM         Date Closed should be later than the Current Start Date.
8/11/2026 2:30:21 PM         Cannot close Project 1003.
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM     Closing Project 1006...
8/11/2026 2:30:21 PM     Project 1006 Closed.
8/11/2026 2:30:21 PM
8/11/2026 2:30:21 PM     Closing Project 1007...
8/11/2026 2:30:21 PM         Only Revenue Recognition can set a Project to closed.
8/11/2026 2:30:21 PM         Cannot close Project 1007.
8/11/2026 2:30:21 PM Cannot close Contract 220-1400-10.
8/11/2026 2:30:21 PM |
8/11/2026 2:30:21 PM Processing completed with one or more errors.
8/11/2026 2:30:21 PM =====

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