Question:

Managing Rejected Invoice Drafts

I have a rejected invoice draft that my colleague is unable to delete. It remains stuck in "Draft" status, and we receive a message like "approval request for this document was canceled. The document cannot be added." How can we delete or remove this rejected draft?

Answer:

In SAP Business One, once a document (including a draft) has been created and especially if it has been involved in an approval process, it **cannot be permanently deleted from the system**, even if it is a rejected draft.

Reason for Non-Deletion: This behavior is a fundamental system control in SAP Business One, designed to ensure **proper traceability and audit compliance**. Every document, including drafts that have gone through an approval workflow, leaves a trail. Allowing deletion would break this audit trail and potentially compromise data integrity. For rejected drafts, the system's standard practice is to simply leave them as-is.

Workaround to Manage Visibility (Not Deletion): While you cannot permanently delete a document draft that was created through an approval procedure, there is a workaround to prevent rejected drafts from cluttering your "Document Drafts Report."

Steps to Close a Rejected Draft (for Reporting Purposes):

1. **Open the Document Drafts Report:**
   - Navigate to `Modules > Administration > Document Drafts Report`.
2. **Locate the Rejected Draft:**
   - Find the specific rejected invoice/order draft in the list.
3. **Close the Draft:**
   - **Option A (Right-Click):** Right-click on the row corresponding to the rejected draft. From the context menu, select **"Close"**.

- ○ **Option B (Data Menu):** Highlight the row of the rejected draft. Go to the menu bar at the top of the SAP Business One window, click `Data > Close`.

Draft No.	Document	Document No.	Posting Date	BP Code	Total	Remarks
6398	Sales Orders ➡ 387	18.06.25	➡			
6399	Sales Orders ➡ 387	18.06.25	➡			
6400	Sales Orders ➡ 387	18.06.25	➡			
6401	Sales Orders ➡ 387	18.06.25	➡			
6463	Sales Orders ➡ 394	20.06.25	➡			
6464	Sales Orders ➡ 394	20.06.25	➡			
6465	Sales Orders ➡ 394	20.06.25	➡			
6546	Sales Orders ➡ 397	24.06.25	➡			
6585	Sales Orders ➡ 398	25.06.25	➡			
6741	Sales Orders ➡ 399	01.07.25	➡			
6742	Sales Orders ➡ 399	01.07.25	➡			
6743	Sales Orders ➡ 399	01.07.25	➡			
6828	Sales Orders ➡ 401	03.07.25	➡			
6856	Sales Orders ➡ 402	04.07.25	➡			
7288	Sales Orders ➡ 403	01.07.25	➡			
7308	Sales Orders ➡ 403	01.07.25	➡			
7388	Sales Orders ➡ 403	01.07.25	➡			
6896	Sales Orders ➡ 404	07.07.25	➡			
6909	Sales Or	Copy	➡			
6910	Sales Or	Copy Table	➡			
6911	Sales Or	Maximize/Restore Grid	➡			
6941	Sales Or	Remove	➡			
7007	Sales Or	Close	➡			
7263	Sales Or	▼ Filter Table	➡			
7164	Sales Or	🅰 Sort Table	➡			
7165	Sales Or	Row Details...	➡			
7166	Sales Or	Document Draft	➡			
7355	Sales Orders ➡ 409	19.07.25	➡			

4. **Verify in Report:**
   - ○ Once the draft is closed using either method, it will no longer appear in the "Document Drafts Report" as long as the **"Open Only" checkbox** (usually found in the report's selection criteria) is selected. This allows you to keep your active drafts list clean.

Document Drafts Report - Selection Criteria

User   All   ☑ Open Only

☐ Date

☑ Sales - A/R   ☐ Purchasing - A/P
    ☐ Sales Quotations
    ☑ Sales Orders
    ☐ Deliveries
    ☐ Return Request
    ☐ Returns
    ☐ A/R Down Payment
    ☐ A/R Invoices
    ☐ A/R Credit Memos

☐ Inventory   ☐ Inventory Counting Transactions

[OK]   [Cancel]