

How to Change Creditor Status to Inactive in REST Professional

Overview

You can now set a Creditor to Inactive either as a one off or by doing a bulk status update through Global Changes. The Creditor Bulk Status Update allows you to select more then one creditor to change their status from active to inactive.

Creditors can only be made inactive if there are:

- No transactions in the current month
- No outstanding transactions against creditor, including recurring and outstanding disbursements
- No current jobs against creditor and property maintenance jobs against the creditor must be completed or rejected

NOTE: There is a System Option that will set temporary creditors to inactive automatically at the end of the month. This can be set up by going to **Other > Utilities > System Options > System** and tick the box.

This document will cover:

- How to Change a One Off Creditor Status to Inactive
- How to do a Bulk Status Update to Inactive

How to Change a One-Off Creditor Status to Inactive

- 1. Go to Files > Creditor and enter the alpha index of the Creditor and press Enter
- 2. Click on the **Active** button, the Creditor Activity Status screen displays
- 3. Select Inactive from the drop down list

4. Click **OK** on Creditor Details. The Active button becomes Inactive and highlighted red

5. Click **OK-F12** to save

🌾 Creditor Details		
Alpha index ADN	Inactive	<u></u>
Name ADN Insurances		
General Payment Notes Barcode M	aintenance	
Address GPD Box 2513		Cancel - ESC
MELBOURNE VIC 3000		Action - F1
Contact	a	Claw, F2
Salutation Six/Madam Email		
Phones Work Ho	me	Delete · F3
Mobile Fa	x	Add Mode - F4
Category Insurance	-	Search - F7
Default account code 210 INSUR	ANCE PREMIUMS	G
Temporary creditor		Last Edits - F9
		0K - F12

How to do a Bulk Status Update to Inactive

To set multiple Creditors' status from **Active** to **Inactive** you must have the highest security level (Statistics/Company Details/Passwords & above):

- 1. Do a backup of your data, renaming the backup i.e. **before.bulk.creditor.change.dat.zip**
- 2. Go to Other > Utilities > Global Changes
- 3. Select **OK** to confirm you have a current data backup
- 4. Select the Bulk Status Update tab
- 5. Click on **Select Creditors**. Only Creditors that can be made Inactive will display

😻 Global changes	
Move Potfolio Inspections GST settings Miscellaneous Fees and charges Action/Diary Bulk Status Update	
Bulk Creditor Status Update	
This utility allows you to bulk update selected Active Creditors' status to Inactive.	
Status changes are recorded on the Active/Inactive Report.	
	se 1
	ancel · ESC

6. Select the **Set as Inactive** tick box against the Creditors you would like to set as inactive

Fiter							6
All C Last Payment Date is between 01/01/1990 and 06/07/2015							
Apha	Creditor	▲ Last Payment	Category	Temporary Creditor	Reg Prop Payments	Set as inactive	Select All
AON	AON Insurances	09/11/2015	Insurance	N	Y	v	Deselect All
COUNCIL	Council	31/12/2013	Council	N	N		
GIO	GIO Insurance	05/10/2015	Insurance	N	N	2	
LEICHCOUN	Leichhardt Municipal Council	31/08/2008	Council	N	N		
NORTHSYD	North Sydney Municipal Council	31/12/2013	Council	N	N		
OWNER	Owner attending				N		
SP13846	Owners of SP13846 - Bay Vista	30/09/2005	Strata Plan	N	N		
SP20657	Owners of SP20657 - Lavender Court		Strata Plan	N	Y		
SP27014	Owners of SP27014 - Esmerelda	31/08/2005	Strata Plan	N	N		
ROCKCOUNCI	Rock Council	31/08/2014	Council	N	Y		
ROCKWATER	Rock Water	31/08/2014	Water	N	Y		
ROCKADV	Rockend Real Estate - Advertising			N	N		~
ROCKRTT	Rockend Real Estate - Tribunal Reimburse			N	N		^
SYDCITY	Sydney City Council	31/01/2008	Council	N	N		Cancel - ESC
WATER	Water Board	31/01/2014	Water	N	N	[7]	

- 7. Click **OK-F12**. Only the Creditors selected and displayed on screen will be set to Inactive.
- 8. Select **Yes** to confirm the number of Creditors, and complete the update
- 9. Select Cancel-ESC to exit out of Global Changes

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