![rockend — The leader in property software]

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Inactive Creditors

REST Professional has introduced Active and Inactive status to Creditor details. All Creditors are set to Active in the version 11 upgrade.

Inactive Status

Creditors that are set to Inactive cannot have transactions processed against them and cannot be attached to a Property Maintenance Job. Creditor Reports have been updated where appropriate to report by Active, Inactive or All creditors.

To set a Creditor as Inactive:

1. Select Files > Creditor.

2. Search for and display the appropriate Creditor.

3. Click the Active button, the Creditor Activity Status screen displays.

4. Select Inactive from the drop down list.
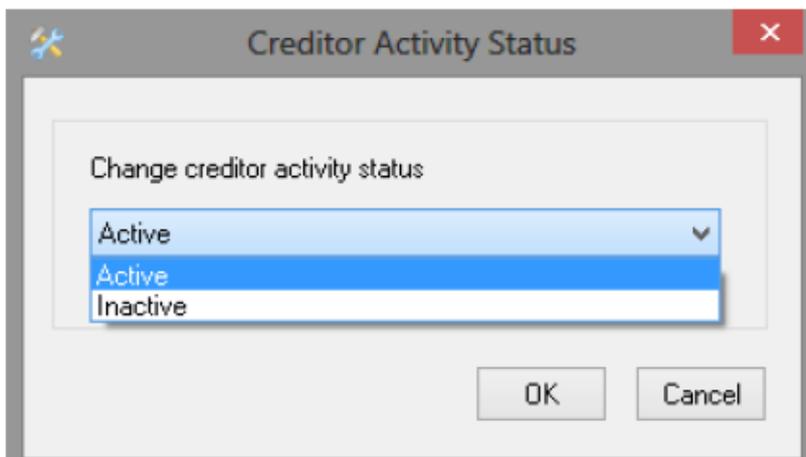
5. Click OK, on Creditor Details the Active button becomes Inactive.

6. Click OK – F12 to save the Creditor as Inactive.

Creditors can only be made inactive if there are:

- No transactions in the current month.

- No outstanding transactions against a creditor, including recurring and outstanding transactions.

- No current jobs against a creditor, Property Maintenance Jobs against the Creditor must be Completed or Rejected.

NOTE:

To completed current Property Maintenance Jobs, delete and add to the Action Diary please see article and video links below. Do not enter an invoice if the creditor has already been paid.

If you want to purge and compress All Property Maintenance Jobs, there will be no record or Action Diary item available to reflect these maintenance jobs.

Finalising a Work Order in Property Maintenance   - Video

How to Purge and Compress Property Maintenance Records

Temporary Creditors

A new option is available to set temporary creditors Inactive rather than deleting them at files update. You must have the highest REST security level (Statistics/Company Details/Passwords & Above) to change this System Option. This option will default to Delete Temporary Creditors during files update with the version 11 upgrade.

To set temporary creditors to Inactive at Files Update:

1. Select Other > Utilities > System Options.
2. Select the System tab.
3. Select Set Temporary Creditors to inactive at the end of the month.
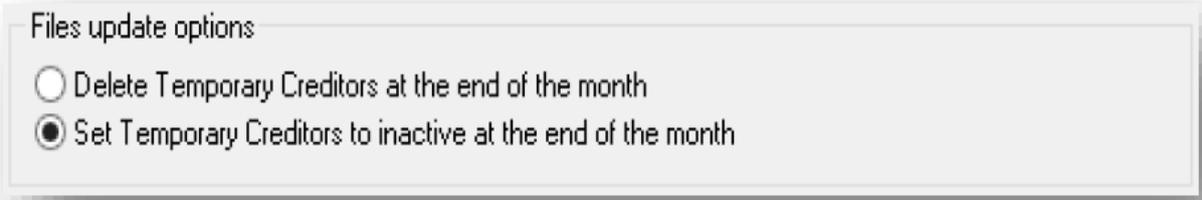
```
Files update options
  ○ Delete Temporary Creditors at the end of the month
  ● Set Temporary Creditors to inactive at the end of the month
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4. Click OK.

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