

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 than 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

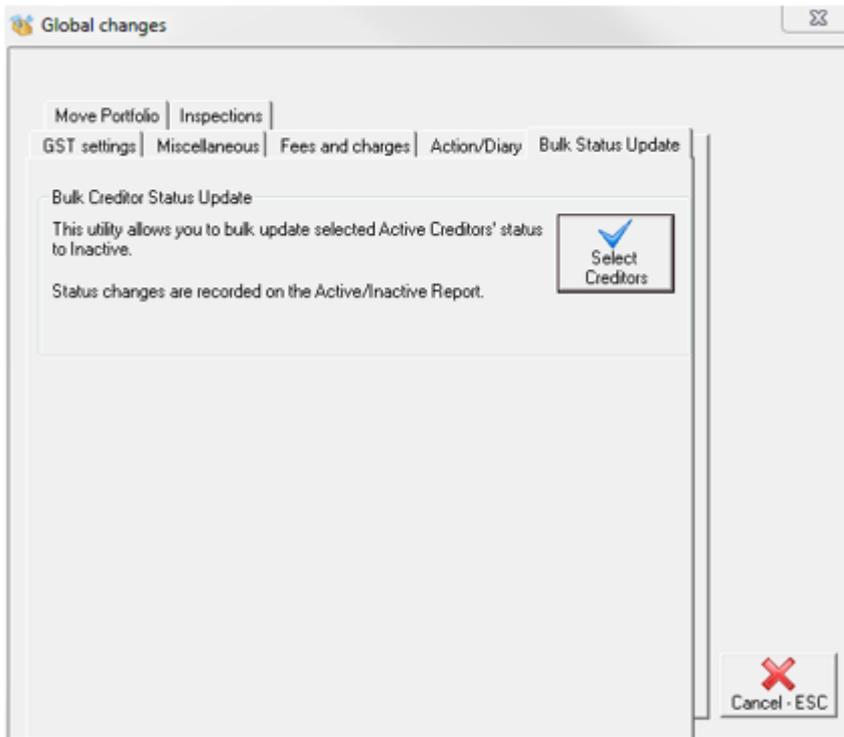
4. Click **OK** on Creditor Details. The Active button becomes Inactive and highlighted red
5. Click **OK-F12** to save

The screenshot shows a software window titled "Creditor Details". At the top, there is a tab labeled "Inactive" which is highlighted in red. Below this, the "Alpha index" is set to "ADN" and the "Name" is "ADN Insurances". The window has several tabs: "General", "Payment", "Notes", "Barcode", and "Maintenance", with "General" being the active tab. The "Address" field contains "GPO Box 2513" and "MELBOURNE VIC 3000". The "Contact" field is empty. The "Salutation" is "Sir/Madam" and the "Email" field is empty. There are fields for "Work", "Home", "Mobile", and "Fax" phones. The "Category" is set to "Insurance" and the "Default account code" is "210 INSURANCE PREMIUMS". There is a checkbox for "Temporary creditor" which is unchecked. On the right side of the window, there is a vertical toolbar with buttons for "Cancel - ESC", "Action - F1", "Clear - F2", "Delete - F3", "Add Mode - F4", "Search - F7", "Last Edits - F9", and "OK - F12".

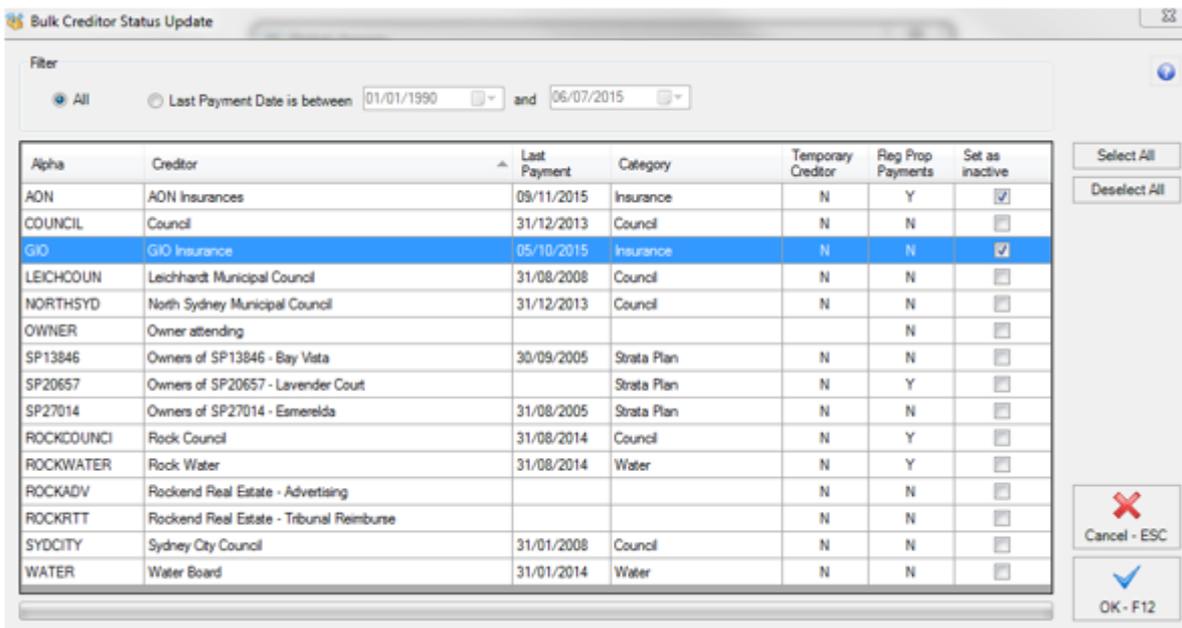
How to do a Bulk Status Update to Inactive

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



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



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