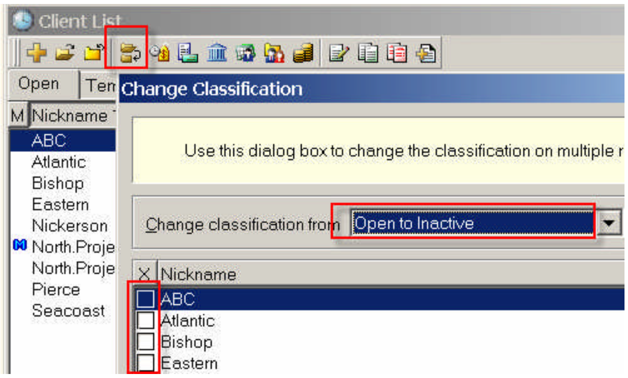
Clients

Change Status from Open to Inactive or Closed

You can move clients from the Active list to Inactive or Closed by following the procedures outlined:



From the client list, select the Change Classification icon. You can change the classification from Open to Inactive or Closed. Place a check mark next to the clients that are to be made inactive or closed.

Tips: Change a client status to Closed if you want to purge the client and as well as all associated slips and transactions. Clients with an Inactive or Open Status cannot be purged.

Make sure there are no open invoices or unbilled slips associated with the client before you change the status. If the client has a balance that you are not going to collect, create a credit entry to bring the balance to zero before you change the classification.

When you change the status from Open to Inactive or Closed, all the slips and transactions associated with that client are "closed". They are not deleted, but will not display or appear on a report unless you specify that you want to show slips/transactions associated with Inactive and Closed Clients.

It is recommended that you initially change status for a small number of clients (no more than 5). Sometimes this process can take a lengthy period of time to complete and is best done in small batches.