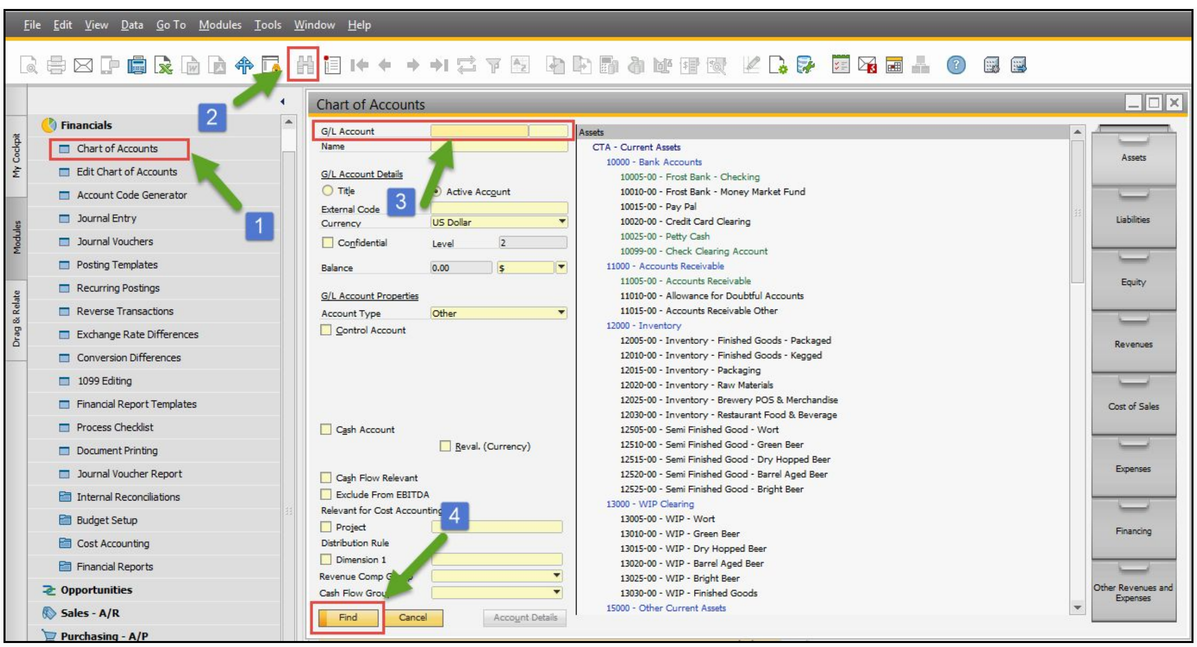
How To Inactivate An Account

Summary

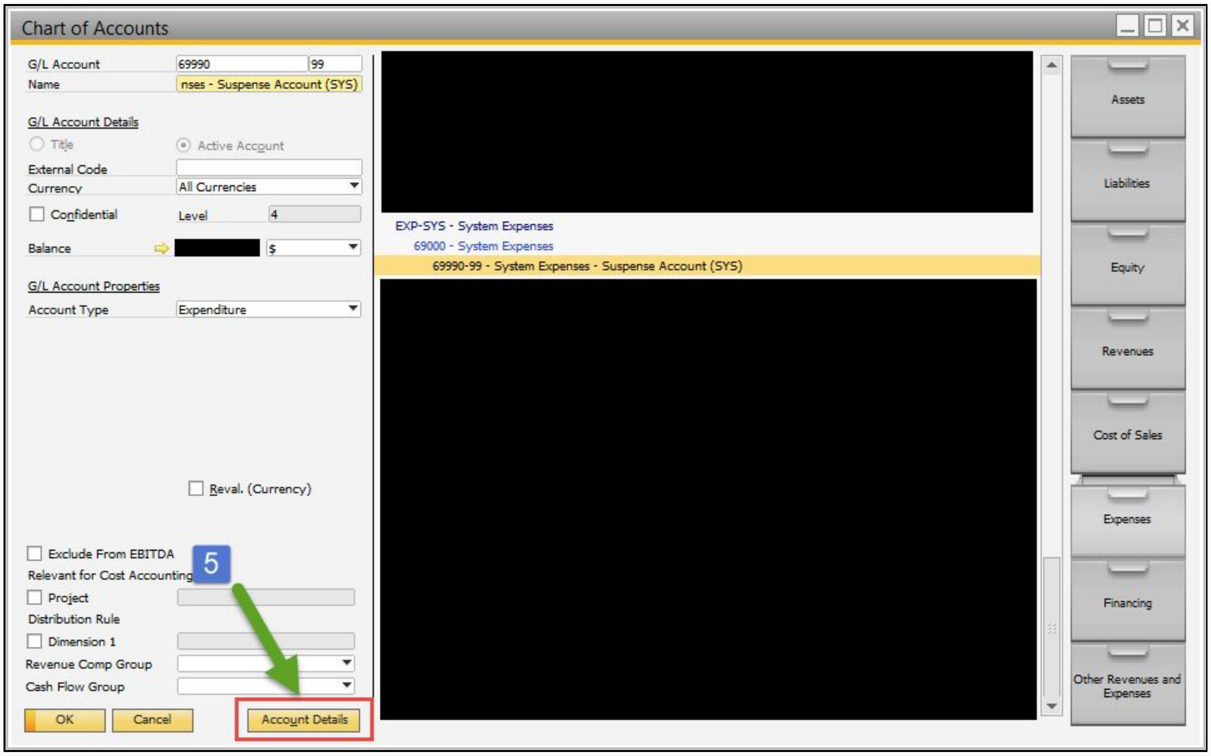
There are cases where it is helpful to inactivate select G/L accounts so that no future transactions can be posted to them. The step-by-step tutorial below will explain the steps required to inactivate an account.

Step-by-Step Tutorial:

1. Navigate to: Financials > Chart of Accounts
2. Make sure that you are in find mode by clicking CTRL +F or clicking on the binoculars icon.
3. Enter the G/L Account that needs to be inactivated
4. Click the yellow ‘Find’ button.



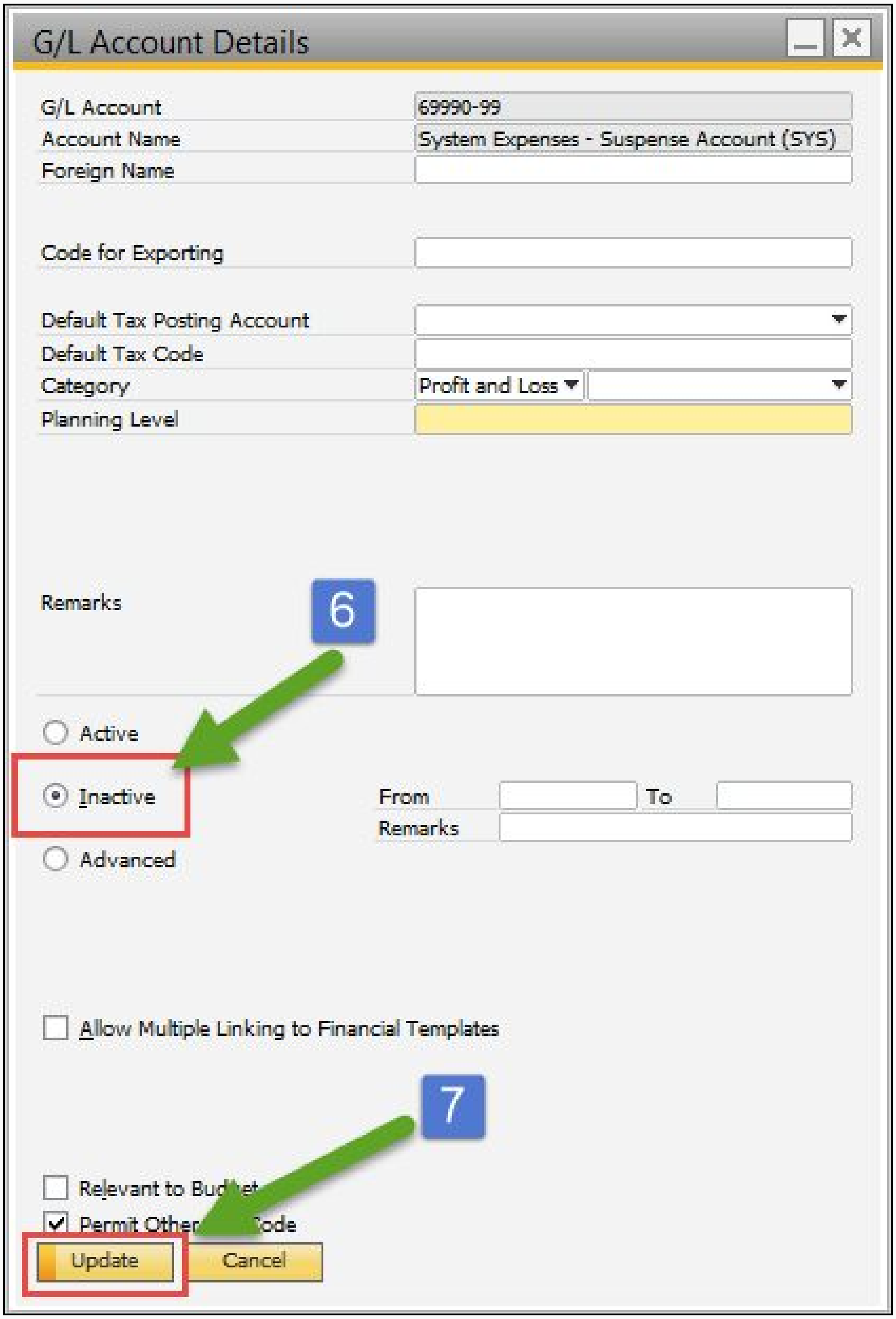
5. Once the account that needs to be inactivated is displayed, click on the yellow ‘Account Details’ button



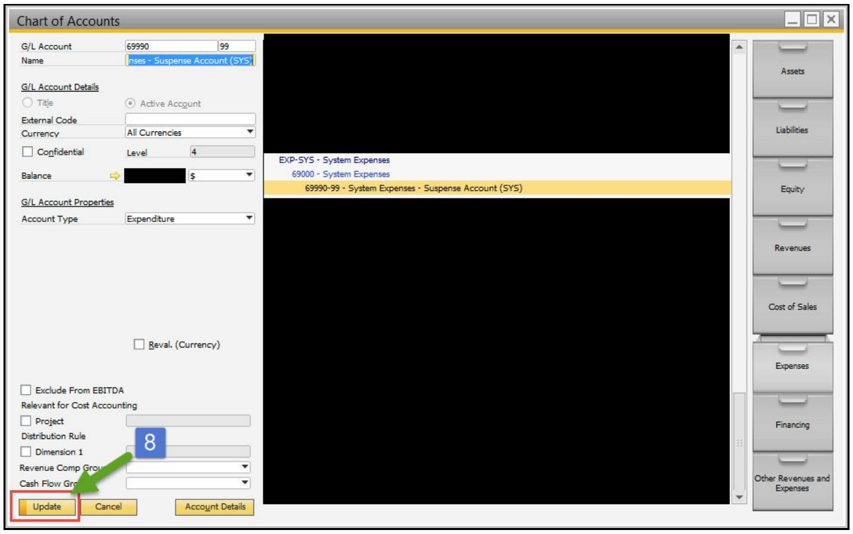
6. Click on the radio button next to ‘Inactive’

You also have the option of specifying when the period of inactivity will begin and end if that is applicable to your situation. Please note that you can also enter either the ‘From’ or ‘To’ date and then leave the other field blank which will select all dates before or after the designated date.

7. Click, ‘Update’ in the G/L Account Details window



8. **IMPORTANT**: Before clicking anywhere else, click, ‘Update’ again in the Chart of Accounts window.



After the account has been inactivated, if a transaction in the system attempts to post to that account, you will receive an error message which will prevent the transaction from posting.