

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.





 Once the account that needs to be inactivated is displayed, click on the yellow 'Account Details' button

G/L Account	69990	99						
Name	nses - Susper	nse Account (SYS	2				1000	
den en la compañía de								Assets
G/L Account Details								
⊖ Title	Active Act	count						_
External Code	All Currenties		-					Liabilities
Currency	All Currencies							
Co <u>n</u> fidential	Level	4	EXP-SYS -	System Expenses			-	
Balance 🛁		\$	69000 -	System Expenses				
			699	90-99 - System Expenses	s - Suspense Account (SYS	5)		Equity
G/L Account Properties								
Account Type	Expenditure	,						
								Revenues
								Revenues
								Revenues
								Revenues
								Revenues Cost of Sale
								Revenues Cost of Sale
	Reval (Currency)						Revenues Cost of Sale
	<u> </u>	Currency)						Revenues Cost of Sale
	🗌 <u>R</u> eval. ((Currency)						Revenues Cost of Sale Expenses
Fxclude From FRITD.	<u>Reval. (</u>	Currency)						Cost of Sale
Exclude From EBITD	Beval. (Currency)						Cost of Sale
Exclude From EBITD Relevant for Cost Accour Protect	Beval. (Currency)						Cost of Sale
Exclude From EBITDA Relevant for Cost Accour Project	Beval. (Currency)						Revenues Cost of Sale Expenses Financing
Exclude From EBITD Relevant for Cost Accour Project Distribution Rule	Beval. (Currency)					##	Cost of Sale
Exclude From EBITD, Relevant for Cost Accour Project Distribution Rule Diemsion 1 Newanue Com Group	Beval (Currency)						Cost of Sale
Exclude From EBITD Relevant for Cost Accour Project Distribution Rule Dimension 1 Revenue Comp Group State Comp Group	Reval. (Currency)						Revenues Cost of Sale Expenses Financing Other Revenues

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

J/L ACCOUNT Detai	
G/L Account	69990-99
Account Name	System Expenses - Suspense Account (SYS)
Foreign Name	
Code for Exporting]
Default Tax Posting Accou	int 🔹
Default Tax Code	
Category	Profit and Loss 🔻 🔍
Planning Level	
Remarks	6
Remarks Active Inactive Advanced	6 From To Remarks
Remarks Active Inactive Advanced	6 From To Remarks to Financial Templates
Remarks Active Inactive Advanced Advanced	6 From To Remarks
Remarks Active Inactive Advanced Advanced Allow Multiple Linking Relevant to Bud let Renemit Other	6 From To Remarks



 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.