



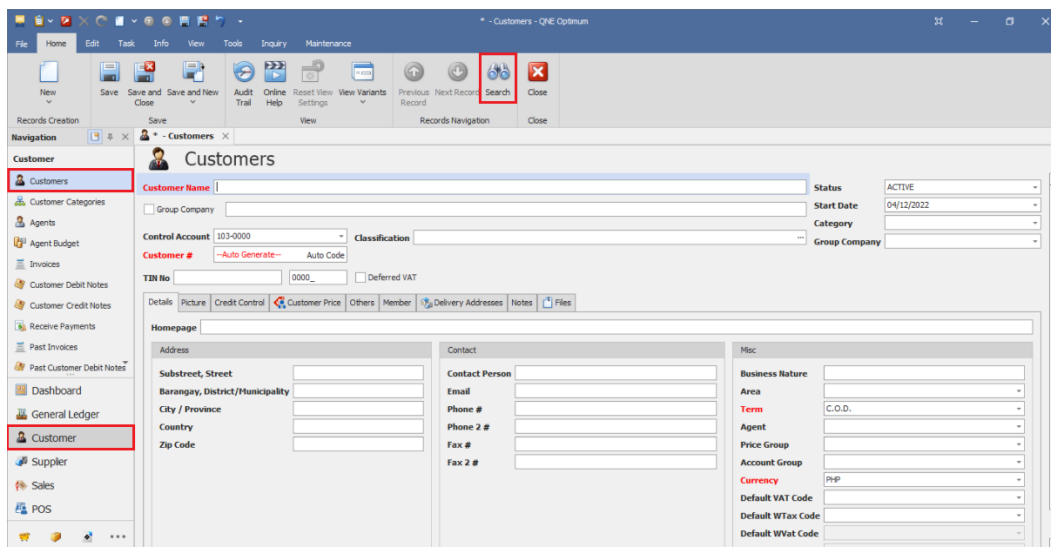
## How to set Customer as Inactive

### Overview:

Inactive customers are those who have not had interactions with your business or no longer acquiring your product or service for quite some time. Once the customer is set as Inactive, it cannot be seen and selected when searching for Customer in Transactions and Reports.

### Procedure(s):

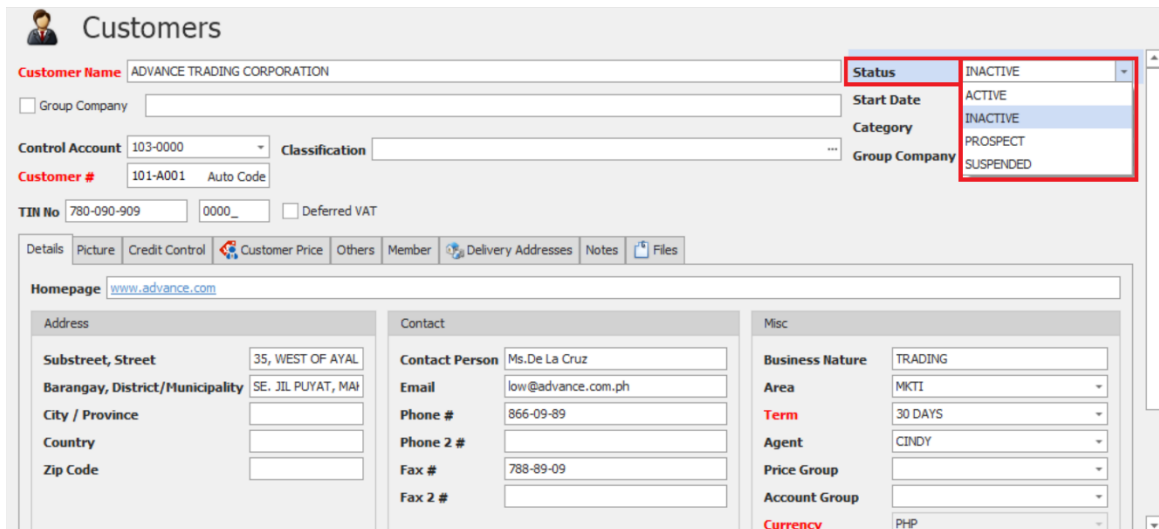
1. In Navigation Pane, Go to Customer > Customers. Click Search to view all existing customers.



2. Look for the customer to Inactive, then select by double clicking.

Customers							
<input type="text" value="Enter text to search..."/> <input type="button" value="Find"/> <input type="button" value="Clear"/>							
Drag a column header here to group by that column							
Acc #	Name	TIN No	Term	Agent	Area	Balance	
101-A001	ADVANCE TRADING CORPORATION	780-090-909	30 DAYS	CINDY	MKT	894,434.05	
101-B001	BEST TECH ENGINEERING, INC	006-829-929	30 DAYS	PETER	SJ	2,189,831.14	
101-C001	CARE SOFTWARE SOLUTIONS INC.	002-928-827	30 DAYS	CINDY	CITY	522,493.92	
101-C002	COSMIC CONSTRUCTION INC.	006-123-165	C.O.D.	PETER	PASIG	52,250.00	
101-D001	DELL COMPUTER INC.	168-121-322	C.O.D.	SAM	CITY	114,542.40	
301-D003	DEPARTMENT OF HEALTH	002-334-443	C.O.D.			404,880.00	
301-S001	SANCHEZ POULTRY FARM	002-202-222	C.O.D.			82,960.00	
101-T001	TRIWAY INC.	004-818-910	C.O.D.	CINDY	PASIG	2,250.14	
101-U001	UOK INC.	006-112-231	C.O.D.	CINDY	MKT		
101-U003	US OUTSOURCING LTD		C.O.D.			7,000.00	
101-U002	US TECHNOLOGY INC.	008-567-223	C.O.D.	SAM	MLA	1,867,793.84	
101-U004	UNILONG INTERNATIONAL TRADING	124-224-434	C.O.D.	SAM	MKT	536,530.23	

- Click *Status* and choose INACTIVE.



**Customers**

**Customer Name** ADVANCE TRADING CORPORATION **Status** INACTIVE

☐ Group Company **Start Date** ACTIVE

**Control Account** 103-0000 **Classification** **Category** INACTIVE

**Customer #** 101-A001 Auto Code **Group Company** PROSPECT

**TIN No** 780-090-909 0000\_ ☐ Deferred VAT **SUSPENDED**

Details Picture Credit Control Customer Price Others Member Delivery Addresses Notes Files

**Homepage** [www.advance.com](http://www.advance.com)

**Address**

Substreet, Street 35, WEST OF AYAL

Barangay, District/Municipality SE. JIL PUYAT, MAI

City / Province

Country

Zip Code

**Contact**

Contact Person Ms.De La Cruz

Email low@advance.com.ph

Phone # 866-09-89

Phone 2 #

Fax # 788-89-09

Fax 2 #

**Misc**

Business Nature TRADING

Area MKTI

Term 30 DAYS

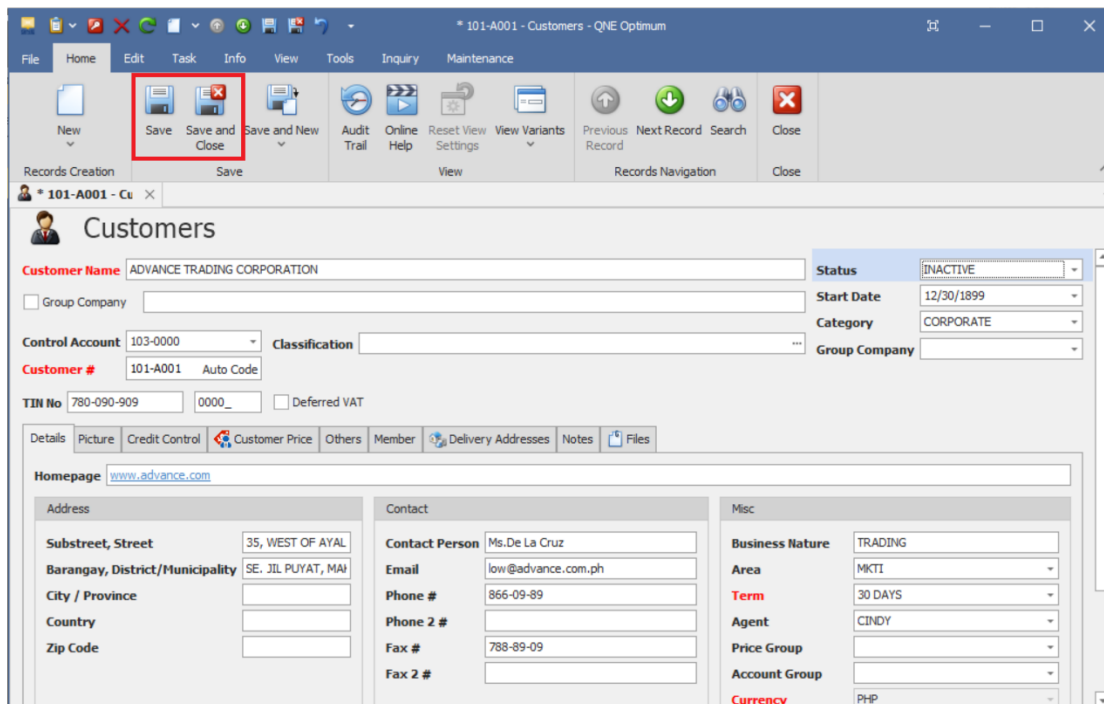
Agent CINDY

Price Group

Account Group

Currency PHP

- Click Save or Save and Close.



File Home Edit Task Info View Tools Inquiry Maintenance

New Save Save and Close Save and New Audit Trail Online Help Reset View Settings View Variants Previous Record Next Record Search Close

Records Creation Save Records Navigation Close

**Customers**

**Customer Name** ADVANCE TRADING CORPORATION **Status** INACTIVE

☐ Group Company **Start Date** 12/30/1899

**Control Account** 103-0000 **Classification** **Category** CORPORATE

**Customer #** 101-A001 Auto Code **Group Company**

**TIN No** 780-090-909 0000\_ ☐ Deferred VAT

Details Picture Credit Control Customer Price Others Member Delivery Addresses Notes Files

**Homepage** [www.advance.com](http://www.advance.com)

**Address**

Substreet, Street 35, WEST OF AYAL

Barangay, District/Municipality SE. JIL PUYAT, MAI

City / Province

Country

Zip Code

**Contact**

Contact Person Ms.De La Cruz

Email low@advance.com.ph

Phone # 866-09-89

Phone 2 #

Fax # 788-89-09

Fax 2 #

**Misc**

Business Nature TRADING

Area MKTI

Term 30 DAYS

Agent CINDY

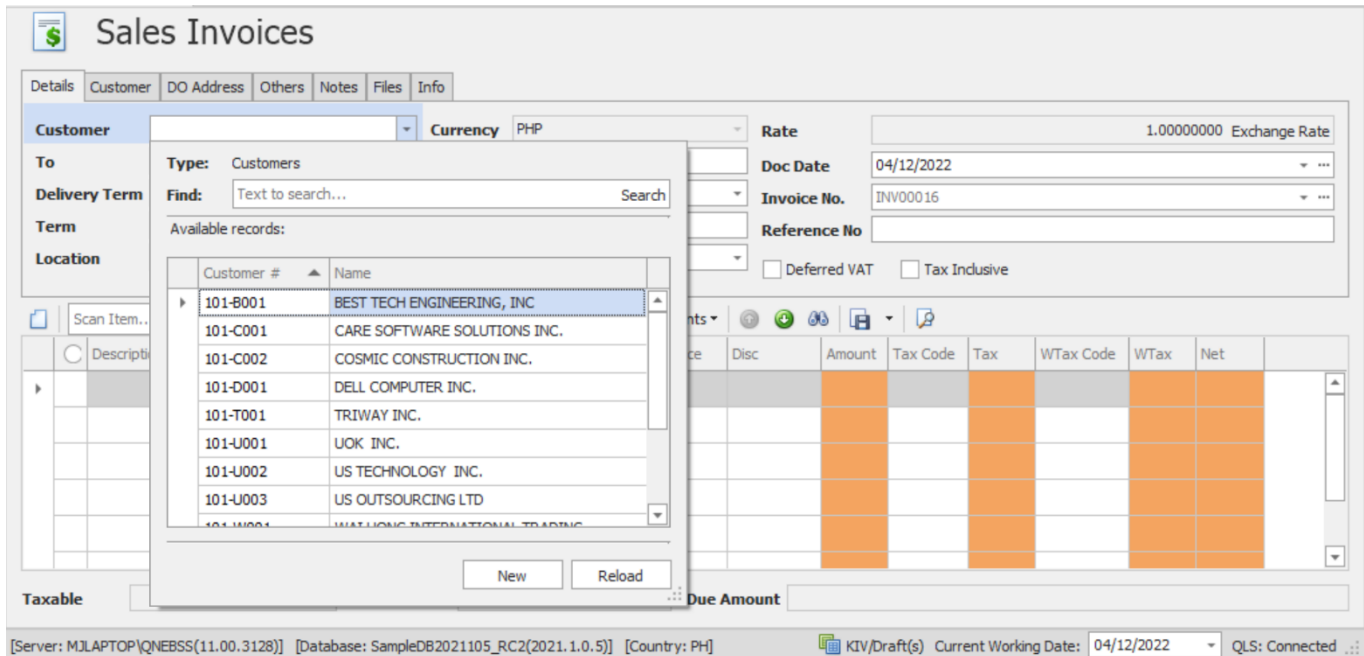
Price Group

Account Group

Currency PHP

**Application:**

In transaction form e.g., Sales Invoice, Inactive customer can no longer be seen in the Customer List when searched.



**Sales Invoices**

Details Customer DO Address Others Notes Files Info

**Customer** Type: Customers Find: Text to search... Search

Available records:

Customer #	Name
101-B001	BEST TECH ENGINEERING, INC.
101-C001	CARE SOFTWARE SOLUTIONS INC.
101-C002	COSMIC CONSTRUCTION INC.
101-D001	DELL COMPUTER INC.
101-T001	TRIWAY INC.
101-U001	UOK INC.
101-U002	US TECHNOLOGY INC.
101-U003	US OUTSOURCING LTD
101-U004	US OUTSOURCING LTD

New Reload

Due Amount

[Server: MJLAPTOP\QNEBSS(11.00.3128)] [Database: SampleDB2021105\_RC2(2021.1.0.5)] [Country: PH] KIV/Draft(s) Current Working Date: 04/12/2022 QLS: Connected

*Note:* Make sure that Customer has zero running balance when setting to Inactive, otherwise, Customer related reports may have amount discrepancy.



**For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>**