

How to Remove an Inactive Customer Account?

Summary

A customer has gone out of business, has been purchased by another customer that the agency doesn't get commission for or has been reallocated by the manufacturer to another agency .

Requirements

Knowledge of *File Transfer Combine* and *Database Maintenance*
FAQ: CR-106, GEN-101

Note

To safe guard the integrity of your yearly comparison figures, we do not allow complete deletion of sales history. Please proceed to the solution for the instructions on how to delete the customer.

Solution

- 1) Set up a miscellaneous customer for dropped accounts if you have not done so previously. (See FAQ GEN-101 How To set up Miscellaneous Accounts)
- 2) Make sure all sessions have been printed and posted.
IF you reconcile commissions, make sure that there are no open invoices that you are expecting to receive payment on. Do the following:
 - a. From the reports menu, select Open Invoice Reports then select 004 – Manufacturer/Customer under Open Invoice Audit Reports.
 - b. Apply a filter for the customer that you wish to remove.
 - c. If there are unpaid invoices listed on this report, use steps in FAQ CR-106 How to Zero out Unpaid Invoices.
- 3) Select the Edit menu > File Transfer/Combine > Mfg/Cust/Rep Transfer (1).
- 4) Under **From** on the left hand side select the customer you wish to remove. (Press F1 for help on using File Transfer Combine)

- 5) Tab to the customer field under **Transfer To** located on the right side, enter the miscellaneous customer code or use the binoculars to bring up the viewer and select the customer created in step 1.

Note: Leave all of the other fields blank

- 6) Select OK at the bottom of the screen.
- 7) A dialog box will appear asking if this is correct. Choose Yes.
- 8) Select a printer from the print options window to print an audit of the transferred information for your records. This audit printout should be kept for at least 1 year.
Note: If you missed any unpaid invoices a Transfer Open Invoices message box will display. It will give you a choice to transfer to the miscellaneous customer or leave as is.
- 9) Review and verify the audit list before continuing.
IF it is wrong, choose No (This is the last chance to cancel the transfer).

IF it is correct, choose Yes at the dialog box that appears after the audit report prints.
- 10) dynaMACS will then process the Phase I transfer for this customer.
 - *Note: You can perform the Mfg/Cst/Rep Transfer Phase I as many times as needed if more than one customer needs to be removed.*
- 11) A message will appear to advise you know that you have to perform the Mfg/Cust/Rep Transfer Phase II transfer.
- 12) Close out of the Mfg /Cust/Rep Transfer/Combine 1 menu by selecting Cancel.
- 13) Select Edit menu > File Transfer/Combine > Mfg/Cust/Rep Transfer (2), to complete the transfer process.
- 14) A print options window will appear for the additional history if any. Select a printer.
- 15) Select Edit menu>File Transfer/Combine>Make Customers Deletable. Type in the original customer code and follow the prompts. Then press OK and select Done
- 16) Or click on Range of Records and press OK and select Done after entering all the customers that you wish to make deletable.
- 17) Go to the Customer Viewer, and select customer that you wish to delete, and click on Edit, then Delete.